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Advertising Age

Crain's International Newspaper of Marketing. In Two Sections. Section 1.

Dentsu's creative leaders, including President Gohei Kogure (seated left), celebrate AA's award as well as being the world's largest agency *(foreign agency income survey starts on Page 62)*.

Diverse Dentsu

Eclectic creativity earns AA honor

By DAVID KILBURN

A white cat swings along a pair of parallel bars. "Please remember this number when you see a cat on a horizontal bar," says an announcer in a 15-second spot promoting Nippon Telegraph & Telephone's toll-free number. Another spot showing a dog climbing a tree reminds, "Please remember . . . when you see a dog climbing a tree."

A well-known male illustrator dressed in the height of fashion sits on a toilet. "God, I beg you, I'm scared of pain," he says in a commercial for SmithKline Sumiyaku's G4 hemorrhoid remedy.

A boy waits apprehensively in a dentist's chair clutching his Yomiuri Giants baseball cap and whispering the team's theme song to boost his courage. As he eyes the strange instruments, he remembers his mother telling him to brush his teeth with Lion's Clinica toothpaste. He is relieved when the dentist proclaims, "They look just fine. You must be brushing them every day."

TOKYO—This eclectic collection of images and unexpected touches of humor from the 1,800 TV commercials Dentsu created last year helped propel the agency past 61 other entries to capture the title of ADVERTISING AGE's International Agency of the Year for 1987.

Best known for its mammoth size—accounting for almost 24% of all advertising billings in Japan—and its media clout—with 40% of prime-time television buying in Tokyo—Dentsu has been redefining and integrating its wide spectrum of

(Continued on Page 60)

Saturn plans agency pay tied to sales

By RAYMOND SERAFIN and GARY LEVIN

Saturn Corp. officials have asked the three finalists in its $80 million agency review to come up with a compensation package tied to the new automotive company's performance.

That compensation system could then serve as a model for paying agencies working on the entire line of products at parent General Motors Corp.

The finalists—N W Ayer; Hill, Holliday, Connors, Cosmopulos; and Hal Riney & Partners—on April 29 submitted written proposals on compensation and on their organization and staffing of the account.

Those issues originally were to be dealt with during this week's final presentations, but Saturn officials changed their minds and asked for the information beforehand.

Phil Guarascio, GM's corporate director of advertising services and a member of the committee picking the Saturn agency, has been a consistent advocate of tying agency compensation to some measure of performance.

Saturn is charged by GM with finding economical ways to make and market cars.

GM has said it considers Saturn a laboratory for developing new manufacturing and marketing strategies. That suggests that the compensation formula used at Saturn could eventually serve as the basis for paying other agencies.

Initially, agency compensation is expected to be on a retainer basis, because no advertising will run immediately.

Agency officials declined to discuss what they've submitted, citing confidentiality agreements

(Continued on Page 101)

Last Minute News

RJR Nabisco cuts agencies

ATLANTA—RJR Nabisco cut Bozell, Jacobs, Kenyon & Eckhardt, New York, and Tatham-Laird & Kudner, Chicago, from its agency roster in a further consolidation, as it prepares for the reassignment of its $80 million in cookie and candy spending pulled from Saatchi & Saatchi DFS Compton, New York (AA, April 11). BJK&E lost $18 million in Planters peanuts and Canadian cereal assignments; TLK lost about $10 million in business. The shifts are designed to give the company "greater clout" with fewer suppliers. FCB/Leber Katz Partners, New York, and agencies owned by Interpublic Group of Cos. are expected to be the prime beneficiaries of the realignment, said to reward R.J. Reynolds Tobacco Co. shops and penalize those with any divisional conflicts. FCB and Interpublic's McCann-Erickson, New York, handle Reynolds' major cigarette brands. Long, Haymes & Carr, Winston-Salem, N.C., and Young & Rubicam, New York, also handle tobacco prod-

(Continued on Page 8)

U.S., foreign buyers sought for McGraw titles

Trade books on block

By PATRICK REILLY

McGraw-Hill Publications Co. is actively seeking both domestic and foreign buyers for some of its trade magazines, industry sources say.

The move comes just two months after the publisher sold off its once-pacesetting *Electronics* and only weeks after the $712 million acquisition of Diamandis Communications Inc. by France's Hachette SA.

The magazines reportedly on the block are *Chemical Engineering, Chemical Week, Modern Plastics, Modern Plastics International* and *Textile World*—all part of McGraw-Hill's Process Industries Group. One source said the plastics books are profitable, the chemical books aren't profitable and the textile book is profitable off and on.

McGraw-Hill executives deliberately packaged the possible sale as a group to include both profitable and unprofitable books.

There's no indication that McGraw-Hill will part with its major trade magazines, such as *Architectural Record, Byte* and *Engineering News-Record*; or its consumer business title, *Business Week*. Those books represent the core of the company's business.

A McGraw-Hill spokeswoman wouldn't comment on whether the company is seeking buyers for some of its magazines.

Electronics was sold in March to VNU Business Publications, the U.S. arm of Dutch publisher Verenigd Bezit VNU.

Two weeks ago, Cahners Publishing Co., owned by British-based Reed International, paid a reported $42 million for Communications/Today Ltd., a North Carolina-based publisher of trade magazines for the furniture and home textile industries.

"The buying activity [in trade publications] is high now," said James Boddorf, exec VP at Veronis, Suhler & Associates and formerly exec VP responsible for acquisitions at McGraw-Hill. "For-

(Continued on Page 100)

◀ Roger Smith: Call him troubled at GM. —Page 48

Who's got the best jammie-man story? ▶ —Page 102

More LGFE exits

Agency loses top broadcast exec

By JON LAFAYETTE and GARY LEVIN

NEW YORK—Lord, Geller, Federico, Einstein took another blow last week when Jean-Claude Kaufmann, senior VP-director of broadcast production, said he will leave for a similar post at Bozell, Jacobs, Kenyon & Eckhardt.

At the same time, two other employees caught in limbo were freed to join Dick Lord's breakaway shop, Lord Einstein O'Neill & Partners.

The two had been prohibited from moving by a temporary restraining order from acting New York state Supreme Court Judge Herman Cahn, but they retained their own counsel to contest that, and Lord Geller then permitted them to leave.

There are no prohibitions placed on Lord Geller people moving to other agencies, however, and Mr. Kaufmann, 44, is the agency's most significant loss of late.

Will they settle?—P. 100

On May 31, he will become BJK&E's director of TV production, a new position. Among other accomplishments, Mr. Kaufmann won a Clio and numerous other awards for his work on Coca-Cola Co.'s commercial starring former football pro "Mean" Joe Greene.

Mr. Kaufmann said his departure was motivated by a desire for a broader role at a larger agency rather than dissatisfaction with the ongoing legal battle at Lord Geller.

"It's an opportunity to go to a place where I feel I can flourish and be involved in making a major effort to improve the creative," he said, adding that Lord Geller has "a limited number of accounts doing TV."

At Lord Geller, Mr. Kaufmann coordinated production of the agency's entire TV and radio commercial output and supervised a 20-

(Continued on Page 100)

Ayer, Army pursue truce to end battle over account loss

By JANET MEYERS

WASHINGTON—The long and bitter legal battle between N W Ayer and the U.S. Army may soon be over.

Lawyers for both sides confirmed last week that they're trying to negotiate an out-of-court settlement of a lawsuit filed against the Army by Ayer after it lost the Army account in 1986.

The attorneys hope to reach an agreement by May 20. If the case isn't settled by then, Ayer will press the lawsuit in U.S. Claims Court here, Ayer attorneys said.

New York-based Ayer created the successful "Be all you can be" campaign for the Army but lost the account amid Army allegations of misconduct by the agency, including bid rigging and overbilling.

Ayer denies any wrongdoing and claims it was unjustly suspended from government work near the close of the Army review. That effectively barred it from the account.

Ayer's suit, filed in late 1986, seeks the $7 million to $10 million in profits the agency says it would have earned from a new five-year advertising contract granted by the Army.

Young & Rubicam got the contract, but Ayer says it would have won the account review if it hadn't been suspended from doing business with the government.

Ayer's suit also seeks reimbursement of $525,000 in expenses it says it incurred from participating in the review before the agency was suspended.

Attorneys wouldn't disclose possible settlement terms, but Ayer is said to be seeking, among other things, government assurance that it won't take any future legal action against the agency.

The government evidently has been loath to relinquish the freedom to file civil suits at some future date against Ayer, possibly to recover $600,000 in alleged overcharges on the Army account.

If the long-running settlement negotiations reach an impasse and the Ayer lawsuit is pressed, one of the issues will be whether the Army improperly used information from a federal grand jury investigation of Ayer to suspend the agency shortly before the Army granted the new ad contract. The grand jury probe should have been kept secret and separate from the military investigation, Ayer attorneys say.

At the time of Ayer's suspension, the government claimed it had new information about Ayer's alleged misconduct.

Court documents subsequently have disclosed that the U.S. Attorney's office in New York believed the grand jury would indict an Ayer public relations VP for alleged kickbacks.

Neither the grand jury probe nor the military investigation resulted in any indictments, however.

Ironically, the settlement, if reached by May 20, would come only three days before Ayer's 18-month suspension from government work is due to expire.#

Highlights

NEWS

12 TV troubles for Gannett
The TV version of "USA Today" is seeking prime-time prices for fringe programming.

24 Michelob dumps Light spots
Research showing consumers were barely aware of Michelob Light commercials prompted Anheuser-Busch to drop its "Light up the night" effort.

36 3M brands team up
3M is planning its biggest promotion ever—with the Summer Olympics as the focal point.

40 Listerine touts ADA seal
Warner-Lambert Co. is boosting its campaign claiming Listerine helps prevent gingivitis.

42 And now, a word from the potatoes
Rice-A-Roni is putting an animated potato family in the starring role of its new TV campaign.

75 Ties that bind can break, too
Despite nearly half a century of togetherness, the ties between JWT and Ford are weakening.

78 Videotel making its plug
U.S. Videotel is readying a marketing push to become a major factor in a blossoming industry.

80 Doner big with Caddys
W.B. Doner & Co. was the big winner at Detroit's 14th annual Caddy Awards show.

93 Airwick rolls Carpet Fresh ads
Airwick's campaign for new Soft Scent Carpet Fresh for Pets is a bad home movie. On purpose.

98 Uniroyal to polish image
Uniroyal likely will join its rivals in creating distinct, national images for brand-name tires.

INTERNATIONAL

62 Japan has yen for the top
The dollar's fall helped many agencies based outside the U.S. boost their standing in the world's top 50 agency rankings, but of the 1,000 agencies in AD AGE's foreign agency income survey, Dentsu benefited the most.

AD REVIEW: Corona takes the road less traveled. P. 104.

SPECIAL REPORT: Grocery Marketing profiles Vons, headed by CEO Roger Stangeland, starting after P. 52.

Departments

Accounts Up for Grabs	94
Brady	54
Brady's Bunch	98
Calendar	90
Classifieds	91
Contract Sports	34
Direct Marketing	46
Editorials	16
For the Record	99
Forum	18
Garfield	58
Letters	20
McKinney	56
MediaWorks	82
People	89
PeopleWorks	88
Photo Review	84, 86
Slices	58
Stroock	56
The Next Trend	54
Words	58

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States sue U.S. over air-fare ads

By JENNIFER LAWRENCE

Twenty-five state attorneys general filed suit May 6 against the U.S. Department of Transportation, charging a recent order on airline advertising was issued illegally.

The petition against the DOT and Transportation Secretary Jim Burnley was prompted by the March 10 DOT order that exempts airlines from including surcharges in the advertised air-fare total. Surcharge disclosure, however, must be made elsewhere in the ad.

The suit, filed in the U.S. Circuit Court of Appeals for the District of Columbia, is the first legal action stemming from the National Association of Attorneys General enforcement guidelines on air-fare advertising.

In the NAAG guidelines, adopted by more than 40 states, surcharges are required to be included in the advertised fare rather than listed separately. This standard is most relevant to international air fares, which usually carry a $23 surcharge listed in a footnote.

Andrea Levine, a New York assistant attorney general, said the NAAG surcharge provision was in line with DOT's standing rule that was in place before the March 10 order modified it.

"The DOT went home and wrote a new order, and that is not how the federal government operates when there's a dramatic change in federal policy," Ms. Levine said. "In my opinion, the order was an effort to prevent states from enforcing the NAAG guidelines."

Further, the DOT order opens the door to a deceptive ad practice by allowing ads to quote a "falsely low price," she said. "It's the big lead banner headline that draws people in. . . . Footnotes are not enough."

The attorneys general lawsuit claims the March 10 order was promulgated illegally because the DOT failed to comply with a law requiring advance publication in the Federal Register and an opportunity for public comment.

On March 2, B. Wayne Vance, DOT general counsel, wrote to seven state attorneys general, saying that states' attempts to regulate fare advertising was pre-empted by federal law. He warned that if states decided to enforce the surcharge provision, "formal legal action" would be considered.

Ironically, the states have struck the first legal blow.

One airline lawyer, who asked not to be named, was surprised by the states' lawsuit because it doesn't directly tackle the issue of federal pre-emption. "It seems the AGs would wait for a better issue than just whether the DOT followed procedure," the lawyer said.#

Cable readies fall attack

Photo by Hal Fisher

"General Hospital" cast member Finola Hughes (l.) joins with Frances Reid of "Days of Our Lives" and fellow "GH" actors Norma Connelly, Ian Buchanan, Jennifer Anglin and Dwan Smith in a picket line in Los Angeles to protest the show's use of non-union writers.

Opportunity in net TV setbacks

By WAYNE WALLEY

LOS ANGELES—Cable TV is amassing a program and promotional arsenal for an all-out, multimillion-dollar assault on the Big 3 TV networks this fall.

Cable executives attending the National Cable Television Association's annual meeting here last week see Hollywood's current union woes and a likely delay of ABC, CBS and NBC's fall season as a timely opportunity to further erode the networks' audience.

CBS already has moved its fall start from Sept. 5 to Nov. 1 or later because of the 9-week-old Writers Guild of America strike (AA, May 2).

A prolonged walkout and the specter of a summer strike against entertainment companies by craft, transportation and unskilled production workers threaten to push this year's new TV season into next year.

The cable industry isn't likely to win the fall ratings war for some time, since cable reaches about 51% of the nation's TV households vs. the broadcast nets' virtual 100% coverage. But cable could make inroads in the ongoing battle for viewers.

"We plan to make sure the American public knows there will be a fall season, and it will be on cable TV," said Greg Moyer, VP-marketing and communications at the Discovery Channel. "We plan to take the lead with other cable networks in identifying our new product and making people aware of the programming. We have a real opportunity to get our product sampled before the Olympics start on NBC."

USA Network plans what could be a multimillion-dollar ad and promotional campaign for the Oct. 3 launch of "Miami Vice" and "Murder, She Wrote" reruns as the foundation of USA's new prime-time schedule.

Turner Broadcasting System has a multimillion-dollar budget to support the planned Oct. 3 launch of Ted Turner's new "super" basic cable channel, Turner Network Television.

ESPN plans a promotional blitz including a National Football League sweepstakes and various other programs for the second year of its NFL coverage.

Other services such as MTV: Music Television and the Learning Channel will have tune-

(Continued on Page 100)

Achenbaum puts his cards on the table

By CLEVELAND HORTON

RANCHO MIRAGE, CALIF.—Consultant Alvin Achenbaum surprised members of the Western States Advertising Agencies Association when he revealed to them for the first time his controversial method for determining agency compensation.

Photo by Arnold Adler

ALVIN ACHENBAUM

Concern about eroding agency commissions dominated informal discussions as senior agency executives convened outside Palm Springs for the association's 38th annual conference.

But when the chairman of Canter, Achenbaum, Associates formally addressed the group, he succeeded in silencing much of the criticism that his New York-based consultancy has endured for its rejection of the once-standard 15% agency commissions.

Recognizing the agency executives as a less-than-friendly audience, Mr. Achenbaum defended himself, saying, "You're going after the wrong culprit."

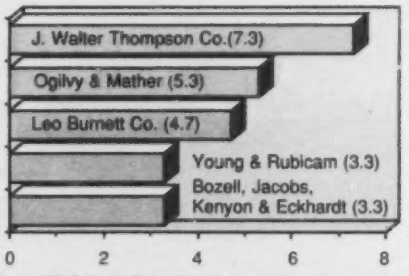
Agencies, with their cost-conscious clients, have acted to diminish the number of accounts generating the 15% billing com-

(Continued on Page 104)

First-quarter AgencyWatch

JWT hangs on to overall "best agency" title . . .

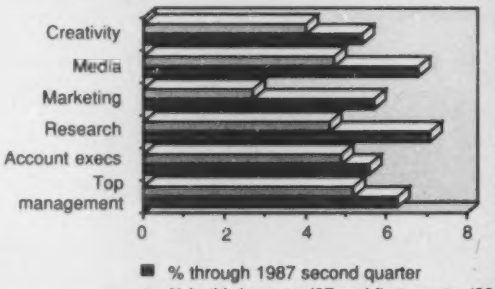
% of ad directors surveyed in first quarter 1988 who said these agencies were best:



Source: SRI Research Center. Nased on quarterly surveys, beginning in 1984, of 300 company ad directors in 20 largest U.S. markets.

. . . but shows weakness in specific traits

JWT's average score in following traits through second quarter 1987 vs. third quarter '87 combined with first quarter '88. (Score=% of ad directors naming JWT best in that trait.)



JWT keeps 'best' rep

By JOSEPH M. WINSKI

J. Walter Thompson Co. seems to be surviving the management turmoil, ownership change and account losses of the past 18 months with its overall reputation intact.

JWT continues to be named the best agency in the country by company advertising executives polled for Agency Watch, ADVERTISING AGE's quarterly survey of agency reputations.

In the latest survey, for the first quarter of 1988, 7.3% of 300 company ad directors answered JWT when asked, "Which ad agency, regardless of size, provides the best overall services and products to its clients?"

That score is a rebound from the agency's slight dip to 5.4% and second place behind Ogilvy & Mather Worldwide in the previous survey, for the third quarter last year.

JWT's latest score is on track with its average quarterly score of 7.4% in 1985, 7.5% in 1986 and 7.7% in 1987. (Last year's figure averages three quarters only, because there was no fourth-quarter survey.)

When respondents were asked which agencies were best in specific characteristics, however, the slippage first noted for JWT in the third quarter of last year (AA, Nov. 16) is still evident.

After consistently ranking first or second with an average score of nearly 6% in marketing, for example, JWT was named best at that by 3.3% in the third quarter last year—and by only 2% in the latest survey.

In the latest survey, the agency

(Continued on Page 99)

World News Roundup

LONDON—Swaddlers, a U.K. manufacturer of house-brand diapers for supermarkets, awarded its $22 million June launch campaign for Togs, a new disposable diaper, to J. Walter Thompson Co.

SEOUL—Cigarette ads will be allowed for the first time in South Korean media, but will be limited to men's magazines. Also, the government agreed to lowering taxes on U.S. and foreign cigarettes.

VIENNA—The Austrian Tourist Office moved its estimated $7 million pan-European account to Demner & Merlicek. GGK, Zurich, previously handled the international account and Grey Advertising's Gould Cargill & Cie. here lost the local business.

MADRID—The Spanish government will quadruple its 1989 ad budget to about $6 million to attract more of the yearly 3.5 million U.S. tourists who visit Europe. Saatchi & Saatchi's Rumrill-Hoyt, Rochester, New York, handles.

Software systems head for FMI

Calculating markets

By JUDANN DAGNOLI and JUDITH GRAHAM

The race is on in the food industry to see who's got the best computer software system for micro-marketing.

Several information systems will be displayed this week at the Food Marketing Institute's annual convention in Chicago, including products from such top suppliers as Dun & Bradstreet Corp., Information Resources Inc. and SAMI/Burke. One of the newest is being touted as the food manufacturer's best weapon against spiraling trade promotion costs, including slotting allowances.

Developed by a new company partially funded by General Foods Corp., this software data base gives food-products marketers more control over brand promotion when dealing with retailers, said Tom Morgan, chairman of Market Metrics, which is marketing the system in a joint venture with SAMI/Burke.

The system is said to locate the best individual stores for sampling programs, isolate neighborhoods in local markets for couponing, find regional areas that need beefed-up sales efforts and pinpoint narrow advertising targets.

A food company wanting to test

(Continued on Page 102)

BEST AVAILABLE COPY

Scouts agree: It's hot if it's microwaveable

Fresh items, 1950s Americana, fast-food at retail all to grow

Call them the ultimate shopping animals. But when the folks at *New Product News* cruise the grocery aisles, they're not looking to fill their larders.

NPN staffers' primary function is to monitor new additions to the food chain. They do this by checking 70 trade publications, scouting free standing inserts and newspaper food sections from 40 markets, performing store checks in test markets and hitting trade shows.

Lynn Dornblaser, Chicago-based *NPN*'s general manager, says one thing is clear for the coming year: "Anything microwaveable will continue to be very hot."

The reason is the microwave is heading for an estimated 80% household penetration by 2000. Last year 66% of homes had one, according to a National Family Opinion study. NPD Group reports that a standard oven was used to prepare only 15% of meals last year; only 47% required a stove top.

A 1987 Campbell Microwave Institute study reported that 50% of respondents wanted a special grocery section devoted to microwaveable products, and 52% wanted their favorite canned items to come in microwaveable packaging. Campbell Marketing Research also predicted that microwaveable-only products would generate $750 million in sales by 1990.

With 80% of homes expected to have microwaves by 2000, the rush is on for special grocery sections and new packaging for favorite canned items

Microwaves also have become a fixture in the workplace. With penetration estimated at 70%, there has been a big push in zappable lunch products like Dial's Lunch Bucket, Geo. A. Hormel Co.'s Dinty Moore meals and Campbell Soup Co.'s Souper Combo lines, Ms. Dornblaser says.

These product lines along with Del Monte's Vegetable Classics, Hormel's Top Shelf, New Traditions and Dinty Moore brand lines, Campbell's repackaged chunky—and reportedly some red label—soups, and General Foods' Culinova il-

(Continued on Page S-20)

Hot if it's microwaveable

(Continued from Page S-16)

lustrate other industry trends toward microwaveable, shelf stable and refrigerated products.

Retailers and producers are concerned with safety issues—nothing like a case of botulism to blunt sales and destroy consumer confidence.

But with freezer space at a premium and distribution costs that are about one-fourth those of frozen foods, both retailers and manufacturers have obvious interest in cultivating these areas.

"So far, there aren't that many shelf-stable entrees," Ms. Dornblaser says, "but they're real convenient in terms of both distribution and cooking." Hormel's expansion into more West Coast test markets is a sign that consumers are responding, she says.

In the refrigerated area, General Foods is testing its Culinova line, Carnation Co.'s Contadina Fresh Pasta & Cheese is racing to go national and Kraft Inc. will expand its test of the Chillery line of salads with entrees and side dishes. Fresh prepared foods are estimated to command anywhere from 10% to 15% of the $450 billion food market, according to the Food Industry Institute.

"The whole entree area will really grow," Ms. Dornblaser predicts. Although Culinova has been in test in New York for a year, the fact that it just added seven new flavors indicates it is performing well, she says.

"A related area is retailers getting increasingly into fresh-food preparation, and there are predictions they will be a real big competitor for entree and dinner dollars," she says. Although the costs to equip facilities and hire staffs may be high, the profitability is there because consumers will pay a premium for fresh-cooked products.

Foods that remind buyers of mama's home cookin' also are on the upswing. The new "ethnic" foods are dishes reminiscent of 1950s Americana—chili, macaroni and cheese, meat loaf, potatoes, corned beef hash, stews, chicken and biscuits, etc.—served in man-handler-size portions. "This seems to be an offshoot of the cocooning trend," Ms. Dornblaser says.

Some marketers seem to think cocooning will be carried to new extremes, packaging fast-food that can be bought at retail.

J.R. Simplot Co., best known for its frozen potato and vegetable products, is packaging hamburgers, cheeseburgers, french fries and even milk shakes that can be zapped to order in the comfort of one's microwave.

Hormel's New Traditions line also features a hamburger and cheeseburger. And now ConAgra and Golden Valley Microwave Foods will follow with microwaveable frozen french fries.

Related to this is the boom in hand-to-mouth foods, Ms. Dornblaser says. Oscar Mayer's Zappetites and Lunchables, ConAgra's Banquet Hot Bites and Rich Products' frozen, microwaveable french toast sticks exemplify this trend.

She also envisions other microwaveable breakfast and baking products, like Quaker Oats' Aunt Jemima, Campbell's Swanson and Pillsbury's Microwave lines, showing up at retail.

According to Selling Areas Marketing Inc., sales of microwaveable French toast and pancakes boomed 100% to $28.1 million from mid-1986 to mid-1987.

While nutrition-oriented, low-cal products still will pop up, she thinks low-cholesterol products are the next wave. "But because there is a wide variety of choices in health-oriented, reduced-calorie beverages, entrees, side dishes and snacks, consumers are turning toward indulgence. Now they can blow the calories they're saving in other areas on something big."

This indicates companies will be duking it out in the dessert arena. Led by brand extensions from companies like Pepperidge Farm and Haagen-Dazs Co., "anything that's more upscale, richer, chocolatier, gooier, really indulgent will be popular," Ms. Dornblaser says. Now she's talking.

—*Ed Fitch*

Campbell's Kids busy

It seems Campbell Soup Co. can't keep a lid on new product ideas. The company is far and away the most prolific new product producer.

According to *New Product News*, Campbell has introduced a whopping 354 new food products—defined as any new food entry, including flavors, colors or varieties—in the past three years. Runner-up kudos go to General Foods Corp., which has sent 326 products into distribution during the same time period.

While Campbell was No. 1 last year with 126 product introductions, Kraft Inc. was a close second with 123. They were followed by GF's 119 introductions, and ConAgra, which made a dramatic jump from 47 new products in 1986 to 110 in 1987.

Among the top 20 new product introducers, IC-Pet, Ralston Purina Co. and PepsiCo made the most dramatic cuts from 1986 to 1987.

The top 20 spun out 3,567 new products from 1985 to 1987—225 more than the number put into distribution from 1980 to 1985. The quickened pace is attributed to both internal product development and corporate acquisitions.

An indication of the top 20 generators' impact on the grocery shelves: They accounted for 18.2% of all new product introductions in the past three years.

All it takes is a little culture

Biggest sales gainers, 1986 to 1987

	Tonnage gain	Retail sales ($000,000)
1. Misc. yogurt products	205%	$9.6
2. Misc. refrigerated juices	119	105.0
3. Frozen yogurt	105	24.8
4. Misc. snacks & dips	45	180.4
5. Misc. dough products	34	42.9
6. Frozen french toast & pancakes	30	81.4
7. Corn dogs	24	49.2
8. Misc. fruit juices	23	8.4
Bottled water	23	347.8
10. Frozen breakfasts	22	198.7
Frozen Mexican dishes	22	249.9

Source: SAMI/Burke; for 52 weeks ending Nov. 6, 1987

Soup's on

Top product introducers

	Number of introductions 1985, 1986, 1987
1. Campbell Soup Co.	354
2. General Foods	326
3. Lever Bros./Lipton	260
4. Kraft Inc.	243
5. RJR Nabisco	231
6. ConAgra	216
7. Nestle	213
8. General Mills	197
9. H.J. Heinz	191
10. Sara Lee	184

Source: *New Product News*

HUNGRY

Buffalonians love to eat! That means grocery and food store expenditures represent a considerable sum of money.

In the two-county CMSA (Erie and Niagara) food store sales for 1986 were an estimated $1.7 billion — proof that this active market loves to eat! The median amount spent for groceries in an average week was $66 per household but 22% of adults in the market live in households that spend in excess of $100 per week.

The Buffalo News is the best way to reach these consumers. Over 655,000 adults in the CMSA read an average daily issue of The News — 759,000 on Sunday. If you want to reach Buffalo's food shoppers, The Buffalo News is the medium to choose.

Want to know more about this great food market? Call Hugh G. Monaghan, General Advertising Manager, at (716) 849-3422.

Sources: Belden, 1986; Sales and Marketing Management, 1987.

ON THE GO BUFFALO

THE BUFFALO NEWS

One News Plaza, P.O. Box 100 Buffalo, New York 14240

Food for Sport

CO-OPERATIVE ADVERTISING ASSOCIATES

Call Larry Rothstein, President or Barry Bluestein, Vice President at 201-368-1615

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Beverages. Snack Foods. Desserts. Ice Cream. These are just a few food product categories that can benefit from sports marketing. We're a five-year young, full service advertising agency with an expertise in sports marketing. Let us whip you up a sports marketing recipe that will make consumers hungry for your product.

Dentsu holds off Y&R again

An Advertising Age roundup

The dollar's fall compared with other currencies helped many agencies based outside the U.S. boost their standing in the world's top 50 agency rankings.

According to ADVERTISING AGE's 26th annual foreign agency income survey of 1,000 agencies in 71 countries, Dentsu perhaps benefited the most. The Tokyo-based agency, named AD AGE's International Agency of the Year *(see related story on Page 1)*, kept its spot as the world's largest agency, holding Young & Rubicam down at No. 2 for the second consecutive year.

Dentsu recorded 1987 gross income of $884.5 million on billings of $6.78 billion, up 29.9% and 27.5%, respectively, compared with 1986.

Billings at Dentsu, which also has significant real estate holdings, include about 30% from below-the-line business.

This includes such activities as sales promotion, sports and culture marketing, public relations, exhibits, expositions and market research. Earnings from real estate aren't included in billings figures.

Young & Rubicam remains No. 2 with gross income of $735.5 million and billings of $4.91 billion.

The AD AGE survey is based in U.S. dollars on a historic basis, which has thrown the winning edge back and forth between the U.S. and Japanese giants throughout this decade.

Dentsu benefited from the dollar's 16.1% decline against the yen in 1987.

However, when the 1987 average annual exchange rate for the Japanese yen is applied to the prior year, Dentsu's growth is cut back to 12% in gross income—from 29.9%—and 9.8% in billings, from 27.5%.

From 1973 to 1983, when the dollar was relatively weak, Dentsu ranked as the world's biggest agency.

As the dollar gained strength in 1984, Y&R edged out Dentsu by a slim margin—only $11.6 million in gross income.

As the yen continued its slide, Dentsu slipped further to No. 3 in 1985.

Buoyed by the yen's tremendous strength, Dentsu has now held the top spot for two years.

Total non-U.S. gross income in 1987 hit $7.7 billion and billings totaled $54.1 billion. This compares with $6.5 billion in 1986 gross income and $45.1 billion in billings, in constant 1987 dollars.

A constant dollar factors out exchange-rate fluctuations by applying the average annual exchange rates for the current year to the previous year.

These totals exclude Argentina and Brazil for the comparative years because of the extreme fluctuations in currency and inflation rates.

This year, the weak dollar not only aided Japanese agencies but other non-U.S. agencies as well.

Four Japanese agencies exhibited considerable improvement—Hakuhodo moved from No. 12 last year to No. 10; Asatsu from No. 38 to No. 31; Yomiko from No. 41 to No. 34; and Asahi Advertising from No. 45 to No. 38.

French-based Roux, Seguela, Cayzac & Goudard moved up from No. 26 to No. 22, while Swiss-based agency group GGK went from No. 42 to No. 37.

Newcomers to the top 50 also came from outside the U.S. For example, France's BDDP Group and Backer Spielvogel Bates' Australian shop, George Patterson Pty., joined AA's list as Nos. 45 and 46, respectively.

Despite the lower dollar, some U.S.-based agencies did move up—though virtually all the moves came on the strength of their foreign contributions.

BBDO Worldwide climbed from No. 7 last year to No. 5, McCann-Erickson Worldwide moved up one notch from No. 8 to No. 7 and Leo Burnett Co. went up from No. 14 to No. 12.

Not all U.S.-based networks had such luck. D'Arcy Masius Benton & Bowles, which held the No. 10 position last year, dropped one spot.

DDB Needham Worldwide dropped five slots to No. 14 and Foote, Cone & Belding fell four positions to No. 15.

One key factor determining whether a U.S. agency moved up or down in the rankings was its performance in Europe—the fastest-growing region in the world.

For example, in Europe, Y&R grew by more than 34% in gross income and BBDO grew more than 19%, while DDB Needham and FCB grew hardly at all.

In other European results, O&M grew about 25%; McCann-Erickson, 29%; Grey Advertising, 53%; Lintas:Worldwide, 55%; and Burnett, 34%.

Tumultuous describes 1987 at J. Walter Thompson Co. After Martin Sorrell's WPP Group takeover of JWT Group, which prompted several clients to move business out of the agency, JWT moved down from No. 5 to No. 8.

Those maintaining last year's ranking include Saatchi & Saatchi Advertising Worldwide, at No. 3; Backer Spielvogel Bates Worldwide, at No. 4; Ogilvy & Mather Worldwide, at No. 6; and Grey Advertising, at No. 13.

FOREIGN AGENCY INCOME REPORT 1987

Japan, buttressed by a strong presence on the top 50 chart, led all countries in total gross income with $2.3 billion, up 28.2% from 1986. Comparisons are of the same agencies reporting for both years.

The U.K. maintained its second position with $1.03 billion, up 31.2%.

France, No. 3, was represented by $765.3 million in billings, up 39.3%; No. 4 West Germany had $637.2 million, up 32.2%; and No. 5 Italy tallied $395.7 million, for the biggest growth among the top 10 nations at 47.9%.

Australia came in sixth with $314 million, up 16.4%, for the most "modest" growth among the countries.

That growth, in fact, dropped Australia a notch on the rankings to a fast-charging Italy.

Canada held on to seventh place with $251.2 million, up 24%; Spain continued in eighth at $195.9 million, up 41.7%; and Brazil held down the No. 9 spot with $183.8 million in billings. Sweden remained No. 10 with $158.4 million, up 44%.

Local currency in each of these countries showed gains against the dollar and ranged from a growth in the deutsch mark of 26.6% against the dollar to a 2.6% growth in the Australian dollar.

In the race for billings leadership among agency holding companies, Saatchi & Saatchi PLC again heads the list *(see chart, Page 74)*.

The U.K. holding company—with components including Saatchi, Backer Spielvogel Bates, Dorland and KHBB—claimed gross income of $1.68 billion on billings of $11.36 billion.

This is the second year that Saatchi has topped Interpublic Group of Cos., which is made up of Dailey & Associates, McCann-Erickson, Lintas:Worldwide and 70% of Lowe Marschalk. Interpublic claimed gross income of $992.9 billion on billings of $6.62 billion.

Repeating its 1986 performance, Omnicom Group, holding company for BBDO Worldwide and DDB Needham Worldwide, held on to its No. 3 spot.

The top 10 holding companies are rounded out by WPP Group, Ogilvy Group, Eurocom, WCRS/Belier Group, Lowe Howard-Spink & Bell, Alliance International and Mojo MDA International.#

World's top 50 agency groups

Rank '87	Rank '86	Agency	Gross income	Billings
1.	(1)	Dentsu Inc.	$884.5	$6.78 bill.
2.	(2)	Young & Rubicam [1]	735.5	4.91 bill.
3.	(3)	Saatchi & Saatchi Advertising Worldwide [2]	693.6	4.61 bill.
4.	(4)	Backer Spielvogel Bates Worldwide [3]	600.7	4.07 bill.
5.	(7)	BBDO Worldwide [4]	537.0	3.66 bill.
6.	(6)	Ogilvy & Mather Worldwide [5]	528.6	3.66 bill.
7.	(8)	McCann-Erickson Worldwide [6]	512.5	3.42 bill.
8.	(5)	J. Walter Thompson Co. [7]	483.0	3.22 bill.
9.	(15)	Lintas:Worldwide [8]	417.9	2.79 bill.
10.	(12)	Hakuhodo International	383.4	2.90 bill.
11.	(10)	D'Arcy Masius Benton & Bowles [9]	371.3	2.49 bill.
12.	(14)	Leo Burnett Co.	369.2	2.46 bill.
13.	(13)	Grey Advertising	369.2	2.46 bill.
14.	(9)	DDB Needham Worldwide [10]	358.5	2.60 bill.
15.	(11)	Foote, Cone & Belding Communications [11]	344.6	2.30 bill.
16.	(—)	WCRS/Belier [12]	230.2	1.63 bill.
17.	(—)	HDM [13]	204.0	1.38 bill.
18.	(16)	Bozell, Jacobs, Kenyon & Eckhardt	185.2	1.33 bill.
19.	(18)	N W Ayer	166.1	1.22 bill.
20.	(19)	Publicis International	164.3	1.09 bill.
21.	(—)	Lowe Group [14]	137.3	968.3
22.	(26)	Roux, Seguela, Cayzac & Goudard [15]	115.7	830.1
23.	(21)	Wells, Rich, Greene	114.0	765.0
24.	(24)	Tokyu Advertising Agency	113.9	826.8
25.	(22)	Dai-Ichi Kikaku	109.4	836.7
26.	(25)	Daiko Advertising	107.1	879.9
27.	(27)	Scali, McCabe, Sloves [16]	93.1	653.2
28.	(28)	Ketchum Communications	88.1	660.0
29.	(31)	Ogilvy & Mather Direct Response	84.0	560.0
30.	(33)	TBWA	79.0	545.0
31.	(38)	Asatsu Advertising	73.4	489.3
32.	(34)	Ross Roy Inc.	71.3	475.3
33.	(37)	I&S Corp. [17]	65.8	540.4
34.	(41)	Yomiko Advertising	64.7	477.3
35.	(36)	Campbell-Mithun	63.9	425.8
36.	(40)	Wunderman Worldwide	62.1	414.8
37.	(42)	GGK [18]	59.3	415.0
38.	(45)	Asahi Advertising	54.4	340.6
39.	(43)	Chiat/Day	52.5	350.0
40.	(—)	Mojo MDA [19]	52.5	348.0
41.	(—)	Dorland Worldwide	49.6	331.0
42.	(44)	Tracy-Locke	47.3	326.0
43.	(35)	Lowe Marschalk [20]	45.6	304.2
44.	(—)	Doremus & Co.	45.4	304.1
45.	(—)	BDDP Group [21]	44.6	297.6
46.	(—)	George Patterson Pty. [22]	44.3	295.3
47.	(48)	Hill, Holliday, Connors, Cosmopulos	43.4	289.6
48.	(—)	McCaffrey & McCall	42.1	308.9
49.	(47)	Laurence, Charles, Free & Lawson	41.5	302.0
50.	(46)	HBM/Creamer	40.9	272.0

NOTES: Dollars are in millions unless otherwise noted.
Included in agency figures are income and revenues from the following subsidiaries and affiliates:

[1]**Young & Rubicam**: HDM (33%); Wunderman Worldwide; Sudler & Hennessey; Stone & Adler; Creswell, Munsell, Fultz & Zirbel.

[2]**Saatchi & Saatchi Advertising Worldwide**: McCaffrey & McCall; Rumrill-Hoyt; Klemtner Advertising, Cochrane Chase, Livingston & Co. The holding company, Saatchi & Saatchi PLC, London, reported world gross income of $1.68 billion on billings of $11.36 billion.

[3]**Backer Spielvogel Bates Worldwide**: Campbell-Mithun; AC&R/DHB&Bess; Kobs & Draft.

[4]**BBDO Worldwide**:Tracy-Locke; Doremus & Co.; Ingalls, Quinn & Johnson, MARCOA DR Group; Lavey/Wolff/Swift; Frank J. Corbett Inc.; Blair Advertising; Franklin Spier Inc.; Caravetta Allen Kimbrough/BBDO.

[5]**Ogilvy & Mather Worldwide**: Ogilvy & Mather Direct Response; Rolf Werner Rosenthal.

[6]**McCann-Erickson Worldwide**: Part of the Interpublic Group of Cos., New York, which reported world gross income of $992.9 million on billings of $6.62 billion.

[7]**J. Walter Thompson Co.**: Brouillard Communications. JWT Group was acquired in June 1987 by WPP Group PLC, London.

[8]**Lintas:Worldwide**: Part of the Interpublic Group of Cos. In October '87 SSC&B:Lintas and Campbell-Ewald were joined to form Lintas:Worldwide.

[9]**D'M&B**: Medicus Intercon International; Ted Colangelo Associates.

[10]**DDB Needham Worldwide**: Kallir, Philips, Ross; Bernard Hodes Advertising Group; Rapp & Collins USA; Kresser, Craig/D.I.K.

[11]**Foote, Cone & Belding Communications**: Lewis, Gilman & Kynett; Albert Frank-Guenther Law; Vicom/FCB.

[12]**WCRS/Belier**: Delia Femina, Travisano & Partners; HBM/Creamer; Creamer Dickson Basford; Heller Breene; Robert A. Becker; Cohn & Wells. In September '87 London-based WCRS acquired 49% of Paris-based Groupe Belier, owned by Eurocom. Earlier in '87 WCRS acquired the Ball Partnership from the Ogilvy Group.

[13]**HDM**: HDM (Havas, Dentsu, Marsteller) is an equal partnership (33 1/3%) between Young & Rubicam, Tokyo-based Dentsu and Havas Conseil.

[14]**Lowe Group**: Lowe International; Allen Brady & Marsh; Laurance, Charles, Free & Lawson.

[15]**Roux, Seguela, Cayzac & Goudard**: includes offices in Austria, Belgium, France (Paris and regional), Germany, Netherlands, Italy, Spain, Sweden, Switzerland, U.K. and O'Rielly O'Brien Clow/RSCG in the U.S. Also, RSCG Export which does business in Africa, the Middle East and French Caribbean and Creative Business International.

[16]**Scali, McCabe, Sloves**: Martin Agency, Fallon McElligott.

[17]**I&S Corp.**: Formerly Dai-Ichi Advertising, Tokyo, which merged in 1986 with SPN Co., a communications and sales promotion company of the Seibu Saison Group.

[18]**GGK Holding**: A Basel, Switzerland-based agency group with offices in Austria, Germany, France, Netherlands, Spain, U.K., Italy and Brazil. Lois Pitts Gershon/GGK, New York, is also part of the group.

[19]**Mojo MDA**: 14 offices in Australia, New Zealand, Hong Kong, Singapore, U.K. and the U.S.

[20]**Lowe Marschalk**: Interpublic Group of Cos. holds 70% of LM; Lowe Howard-Spink & Bell PLC, London, the other 30%.

[21]**BDDP Group**: Boulet, Dru, Dupuy, Petit, Paris, lists nine regional agencies and 10 affiliated companies.

[22]**George Patterson Pty.**: Part of Backer Spielvogel Bates.

Compiled by Ilse Cermak

FOREIGN AGENCY INCOME REPORT

Agency	City	Owner-ship	Gross income	% chg	Billings	% chg	Work force 1987	Work force 1986
ARGENTINA			**Exchange rates: 0.400000/0.400000 austral**					
J. Walter Thompson Argentina	Buenos Aires	MJ	6,363	NA	42,442	NA	136	144
Casares Grey	Buenos Aires	NA	4,028	NA	26,866	NA	69	74
Gowland Publicidad	Buenos Aires	NA	3,331	NA	16,419	NA	85	80
Ortiz, Scopesi y Cia.	Buenos Aires	MN	2,794	NA	14,830	NA	118	90
Ricardo de Luca Publicidad	Buenos Aires	NA	2,740	NA	18,264	NA	100	100
David Ratto/BBDO	Buenos Aires	MN	2,130	NA	14,207	NA	59	65
Lautrec Publicidad	Buenos Aires	NE	2,095	NA	13,965	NA	73	80
Pragma/FCB	Buenos Aires	MN	1,770	NA	11,810	NA	70	55
Funes Straschnoy & Dreyfus	Buenos Aires	NA	1,696	NA	6,634	NA	45	45
Leo Burnett Co.	Buenos Aires	MJ	1,348	NA	8,990	NA	42	36
Young & Rubicam de Argentina	Buenos Aires	MJ	1,061	NA	7,077	NA	40	31
Lintas Argentina	Buenos Aires	MJ	1,048	NA	6,992	NA	40	44
Ayer Vasquez	Buenos Aires	MN	928	NA	4,192	NA	43	35
H.G. Solanos y Asociados	Buenos Aires	NA	660	NA	3,060	NA	25	20
Yuste Publicidad	Buenos Aires	NA	554	NA	2,771	NA	41	45
Johnson/Benton & Bowles	Buenos Aires	MN	452	NA	2,500	NA	24	22
Rainuzzo Propaganda	Buenos Aires	NA	296	NA	1,680	NA	24	24
AUSTRALIA			**Exchange rates: 0.694900/0.676900 Australian dollar**					
George Patterson Pty.	Sydney	MJ	44,300	31.6	295,333	40.7	440	446
Clemenger BBDO	Melbourne	MN	33,335	13.6	222,349	21.2	NA	NA
Mojo MDA	Sydney	MJ	24,105	15.0	150,654	NA	281	346
DDB Needham Sydney	Sydney	MJ	23,151	44.1	154,340	44.0	140	4
Young & Rubicam Australia	Sydney	MJ	21,347	19.1	141,379	19.1	374	379
Ogilvy & Mather	Melbourne	MJ	16,108	(7.6)	107,443	(7.6)	306	364
Fortune Communication Holdings	Sydney	NA	15,719	1.4	95,267	(1.7)	229	340
McCann-Erickson	Sydney	MJ	15,021	(1.8)	100,190	(1.8)	258	277
D'Arcy Masius Benton & Bowles	Sydney	MJ	13,157	(10.1)	88,424	(3.6)	245	316
Neville Jeffress Advertising	Sydney	NA	11,650	28.2	77,665	28.2	NA	NA
Mattingly Group	Sydney	MJ	11,287	52.4	70,543	52.4	194	140
J. Walter Thompson Australia	Sydney	MJ	10,754	20.4	71,728	20.4	175	198
Lee Burnett Ltd.	Sydney	MJ	9,576	2.0	63,845	2.0	177	199
SSC&B:Lintas Australia	Sydney	MJ	9,176	9.8	61,207	6.6	132	153
SSB Advertising	Sydney	NA	8,870	(7.0)	55,437	(5.7)	118	173
Foote, Cone & Belding	Sydney	MJ	7,768	27.8	51,816	27.8	120	145
Saatchi & Saatchi Advertising	Sydney	MJ	5,900	10.6	39,331	13.4	61	67
Ball Partnership	Sydney	MJ	5,546	NA	36,992	NA	113	NA
Dancer Fitzgerald Sample Australia	Sydney	MJ	4,470	30.2	28,474	24.5	51	38
Forbes Macfie Hansen	Sydney	NA	4,023	13.2	26,823	13.2	35	41
Magnus Nankervis Curl	Sydney	NA	3,683	(21.1)	23,071	(0.9)	56	72
Connaghan & May Ayer	Sydney	MN	3,671	(6.6)	21,723	(4.6)	64	64
Grey Advertising NSW	Sydney	MJ	2,821	(14.2)	17,628	(19.6)	42	62
Tarrant Haysom & Manzie	Melbourne	NA	2,606	55.5	17,373	55.5	76	NA
Hertz Walpole	Sydney	MN	2,571	40.4	15,635	28.1	23	28
Dalziel, Harper & Grey	Melbourne	MN	2,213	33.5	11,663	5.5	44	39
Luscombe & Partners	Port Melbourne	NA	1,946	10.6	12,369	14.9	35	29
Thomson White & Partners	Melbourne	NA	1,529	(5.0)	15,288	(7.8)	NA	33
Scali, McCabe, Sloves	Melbourne	MJ	1,010	5.9	5,260	5.0	18	22
Geoff Niere Advertising	Melbourne	NA	598	14.7	4,189	23.2	11	10
Nexus Advertising Group	Sydney	NA	584	76.2	4,030	70.1	11	9
FCB/Shorter	Perth	MN	516	79.2	3,441	79.1	17	18
AUSTRIA			**Exchange rates: 0.076500/0.063100 schilling**					
GGK	Vienna/Salzburg	MJ	6,906	37.4	46,053	65.5	79	75
Demner & Merlicek	Vienna	NA	6,189	51.5	41,279	45.5	55	48
Lintas:Austria	Vienna	MJ	6,157	114.8	41,067	69.5	54	40
Werbeagentur Wirz	Vienna	MN	5,738	59.5	38,269	59.6	14	15
Ogilvy & Mather	Vienna	MJ	3,883	46.7	25,899	46.7	50	46
MMS Werbeagentur	Linz	NA	2,968	30.7	20,273	29.5	NA	NA
Die Sieber	Vienna	NE	2,907	25.2	21,420	44.5	26	26
Team/BBDO	Vienna	MJ	2,834	35.3	18,896	35.3	21	21
Young & Rubicam	Vienna	MJ	2,693	14.7	17,966	14.7	42	37
Ernst Haupt-Stummer	Vienna	NA	2,372	39.5	14,765	11.4	23	22
HDM Dorland Werbeagentur	Vienna	MN	2,310	60.0	14,841	62.0	14	12
Dr. Puttner & Ted Bates	Vienna	MJ	2,186	26.2	17,098	31.2	NA	24
R.W. Eggert	Vienna	MJ	2,150	43.7	14,306	43.3	NA	NA
RSCG-Jasch & Schramm	Vienna	MJ	2,004	68.1	12,699	52.5	20	18
Grey Austria	Vienna	MJ	1,920	29.5	12,852	29.9	27	27
D'Arcy Masius Benton & Bowles	Vienna	MJ	1,649	31.5	11,096	32.7	18	18
J. Walter Thompson	Vienna	MJ	1,624	17.5	10,831	17.5	22	25
Publicis Wien	Vienna	MJ	1,423	43.6	13,388	36.2	20	19
Publicitas	Vienna	NE	1,392	29.0	14,535	23.4	15	15
DDB Needham	Vienna	MJ	1,354	NA	5,814	NA	17	NA
Gould Cargill & Cie.	Vienna	MJ	1,293	(6.9)	8,568	(7.6)	22	21
Marketing Studio/FCB	Vienna	MN	1,071	19.5	7,144	19.5	14	17
Campbell-Ewald	Vienna	MJ	33	(50.6)	220	(50.6)	2	2
BAHRAIN			**Exchange rates: 2.650000/2.650000 dinar**					
Fortune Promoseven Network	Manama	NA	4,765	(16.5)	31,766	(16.5)	75	70
Radius Advertising	Manama	NE	1,147	NA	7,651	NA	26	NA
Madco Bahrain	Manama	NA	820	24.2	3,700	23.3	15	12
BARBADOS			**Exchange rates: 0.513300/0.537100 Barbados dollar**					
Corbin Advertising	Bridgetown	MJ	553	15.0	3,697	15.0	18	18
BELGIUM			**Exchange rates: 0.026300/0.021500 Belgian franc**					
Ted Bates S.A.	Brussels	MJ	11,144	46.6	56,826	38.2	120	94
HHD Ogilvy & Mather	Brussels	MJ	9,806	27.5	NA	NA	119	117
D'Arcy Masius Benton & Bowles	Brussels	MJ	9,264	59.1	71,149	83.8	128	118
Lintas:Belgium	Brussels	MJ	7,069	33.6	47,147	33.6	82	74
Lowe Troost	Brussels	MJ	5,627	26.0	37,530	26.0	73	64
HDM Dechy	Brussels	MJ	5,382	25.2	35,906	25.2	85	90
Young & Rubicam Belgium	Brussels	MJ	5,041	18.6	33,623	18.6	75	66
VVL/BBDO	Brussels	MJ	4,917	46.5	32,795	46.5	62	58
Partner	Brussels	NE	4,739	102.4	31,606	102.4	47	42
J. Walter Thompson	Brussels	MJ	4,720	36.0	31,484	36.0	51	63
Impact/FCB	Brussels	MJ	4,356	32.5	29,052	32.5	60	58
DDB Needham Worldwide	Brussels	MJ	4,165	29.6	27,768	29.5	55	54
Garbarski RSCG	Brussels	MJ	3,822	66.1	27,430	72.4	40	34
Publicis	Brussels	MJ	3,681	26.2	24,553	26.2	49	53
Leo Burnett Belgium	Brussels	MJ	3,568	51.5	23,790	51.5	43	39
L.V.H. Alliance	Brussels	MJ	3,132	43.2	20,877	43.2	52	48
Grey	Brussels	MJ	3,120	10.0	20,800	9.9	41	46
HDM Dechy International	Brussels	MJ	2,548	0.4	17,004	0.5	36	39
TBWA	Brussels	MJ	2,280	17.8	15,210	19.8	28	28
M&CW	Brussels	MJ	1,950	6.7	13,000	4.3	30	30
Moors-Bronselaer	Brussels	MJ	1,348	65.9	8,859	63.4	16	12
Three Points	Brussels	NA	1,206	27.5	8,047	28.2	19	19
Accent	Brussels	NA	928	30.0	6,786	35.5	NA	NA
Morael & Partners	Antwerp	MJ	917	143.7	6,116	143.7	10	7
GelderInterpartners	Brussels	NA	801	33.9	5,343	34.3	14	13
Katte Empain	Brussels	MJ	780	NA	5,200	NA	10	NA
MarkCom SA	Brussels	NA	775	31.0	5,538	32.1	16	18
Moussault Ayer	Antwerp	MJ	692	36.3	4,612	36.4	12	15
BERMUDA			**Exchange rates: 1.000000/1.000000 Bermuda dollar**					
Advertising Associates Compton	Hamilton	NE	1,240	135.3	8,241	118.2	23	22
BRAZIL			**Exchange rates: 0.025500/0.025500 cruzado**					
MPM Propaganda	Sao Paulo	NA	26,977	NA	107,910	NA	833	953
Salles/Inter-Americana	Sao Paulo	NE	24,225	NA	121,125	NA	499	508
Duailibi, Petit, Zaragoza	Sao Paulo	NA	20,840	NA	83,358	NA	302	350
J. Walter Thompson Publicidade	Sao Paulo	MJ	15,288	NA	101,971	NA	381	362
Standard, Ogilvy & Mather	Sao Paulo	MJ	14,075	NA	55,246	NA	391	389
McCann-Erickson	Sao Paulo	MJ	11,640	NA	77,641	NA	356	354
Fisher, Justus/Young & Rubicam	Sao Paulo	MJ	10,172	NA	67,846	NA	292	333
Norton Publicidade	Sao Paulo	NE	9,053	NA	36,210	NA	300	300
SSC&B:Lintas Brasil	Sao Paulo	MJ	7,591	NA	50,633	NA	152	152
SGB Publicidade	Sao Paulo	NE	7,395	NA	36,975	NA	170	190
Leo Burnett Publicidade	Sao Paulo	MJ	6,310	NA	42,071	NA	79	79
CBBA/PROPEG	Sao Paulo	MJ	6,000	NA	24,000	NA	NA	331
W/GGK	Sao Paulo	MJ	4,365	NA	28,239	NA	85	56
Expressao	Sao Paulo	NA	3,698	NA	14,790	NA	NA	120
Adag Servicos de Publicidade	Sao Paulo	NA	3,629	NA	18,143	NA	NA	62
Caio Domingues & Associados	Rio de Janeiro	NA	2,523	NA	8,047	NA	72	60
FCB/Siboney	Sao Paulo	MJ	2,461	NA	16,414	NA	71	61
GTM&C	Sao Paulo	MN	1,980	NA	11,311	NA	80	51
LS/BBDO	Sao Paulo	MN	1,935	NA	12,910	NA	NA	100
Scali, McCabe, Sloves Brazil	Sao Paulo	MJ	1,262	NA	4,980	NA	74	91
Esquire Publicidade	Rio de Janeiro	NA	1,202	NA	6,012	NA	NA	58
Promo, Ogilvy & Mather	Sao Paulo	MJ	612	NA	2,128	NA	30	50
Direct, Ogilvy & Mather	Sao Paulo	MJ	551	NA	1,824	NA	21	15
Alcantara Machado, Periscinoto	Sao Paulo	NA	NA	NA	NA	NA	NA	421
BRITAIN			**Exchange rates: 1.576400/1.467800 pound**					
Saatchi & Saatchi U.K.	London	MJ	114,494	23.6	763,293	23.6	NA	2,000
Ogilvy Group Holdings	London	MJ	64,118	30.9	414,631	31.4	978	938
J. Walter Thompson Co.	London	MJ	57,554	16.9	383,696	16.9	642	646
Grey Ltd.	London	MJ	54,985	82.8	366,639	83.7	522	338
Charles Barker Group	London	NA	52,407	26.2	347,906	34.9	776	772
McCann-Erickson U.K.	London	MJ	51,819	33.0	345,637	33.0	844	848
Dorland Advertising	London	MJ	49,657	18.7	331,044	18.7	518	589
Young & Rubicam Holdings	London	MJ	46,589	23.9	311,281	23.9	645	660
WCRS Group	London	NA	34,227	72.7	272,493	106.3	504	205
Bosse Massimi Pollitt Partnership	London	NA	29,755	44.5	198,469	44.5	285	250
Lowe Howard-Spink Ltd.	London	MJ	27,694	31.4	189,893	26.8	252	201

NOTES: All currency is given as U.S. dollars in thousands. Exchange rates are given for 1987 and 1986, respectively.

Compiled by Ilse Cermak

Agency	City	Owner-ship	Gross income	% chg	Billings	% chg	Work force 1987	Work force 1986
D'Arcy Masius Benton & Bowles	London	MJ	25,831	18.3	172,436	18.4	354	349
Collett Dickenson Pearce Intl.	London	NA	23,882	25.6	159,216	24.0	300	253
KHBB	London	MJ	21,694	62.9	144,635	62.9	NA	180
Ted Bates Holding Group	London	MJ	21,228	48.6	144,241	50.5	258	202
Lintas U.K.	London	MJ	19,669	29.4	131,191	11.6	255	184
Leo Burnett Ltd.	London	MJ	18,207	21.1	121,369	21.1	220	194
DDB Needham	London	MJ	17,375	15.3	115,834	(7.9)	242	206
Allen Brady & Marsh	London	MJ	17,375	39.1	115,834	39.1	162	170
Abbott Mead Vickers/SMS	London	NA	17,203	33.1	131,396	52.1	157	120
McCormick Publicis	London	MJ	16,576	28.7	110,506	28.7	190	175
Davidson Pearce	London	NA	16,257	6.5	129,572	6.9	197	210
Bartle Bogle Hegarty	London	NA	14,192	69.6	94,616	67.0	142	97
Foote, Cone & Belding	London	MJ	13,814	(15.0)	92,139	(15.0)	239	277
Gold Greenlees Trott	London	NA	13,596	30.5	90,643	22.5	129	120
Lowe Bell Communications	London	MJ	13,232	330.3	88,259	332.6	359	NA
Yellowhammer Advertising	London	NA	12,391	47.7	82,603	47.7	126	NA
Dewe Rogerson Ltd.	London	NA	11,010	56.5	98,525	56.5	161	130
Geers Gross Advertising	London	NA	10,404	0.5	69,362	0.5	76	91
Ayer Barker Ltd.	London	MJ	9,143	29.8	67,470	33.2	97	94
Cogent Elliott	London	NA	8,985	13.4	59,903	13.4	150	NA
ARC Advertising	London	NA	8,938	76.6	59,588	75.0	79	45
Chetwynd Haddons	London	NA	8,902	24.6	59,351	24.6	112	NA
HDM Horner Collis & Kirvan	London	MJ	8,497	27.5	76,455	27.4	92	85
Colman RSCG	London	MJ	8,355	21.1	70,307	31.6	80	74
Lonsdale Advertising	London	NA	7,677	11.8	51,186	11.8	101	111
ASL Alliance	London	MJ	7,567	49.4	50,445	25.9	NA	NA
TBWA	London	MJ	7,486	12.0	49,920	12.1	51	57
BBDO	London	MJ	6,572	10.3	43,844	10.3	85	82
Connell May & Steavenson	London	NA	5,675	12.1	37,834	12.1	65	NA
Still Price Court Twivy D'Souza	London	NA	5,462	61.1	36,415	61.1	47	NA
GGK	London	MJ	5,439	23.5	36,257	23.5	48	46
White Bull Holmes Group	London	MJ	5,234	29.7	34,838	29.3	NA	NA
LansdownEuro	London	MJ	5,202	15.4	34,681	15.3	65	60
Delaney Fletcher Delaney	London	NA	4,646	47.1	30,976	47.1	27	21
Leagas Delaney Partnership	London	MJ	4,611	74.5	30,740	74.5	43	NA
Valin Pollen	London	NA	4,540	8.0	30,267	8.0	134	NA
St. James Alliance	London	MJ	3,468	23.7	23,110	23.8	NA	NA
Garratt Baulcombe	Nottingham	MJ	3,076	1.5	20,518	1.5	95	99
Slaymaker Cowley White/BJK&E	London	MN	3,042	(7.2)	23,741	49.4	49	52
Mallett McCormick	London	NE	2,790	21.9	23,252	21.9	38	35
Butler, Borg & LSW	London	MN	2,368	54.2	15,624	46.0	45	42
Butterfield Day Devito Hockney	London	NA	2,163	NA	14,424	NA	19	NA
BBDO Business Communications	London	MJ	1,565	(1.7)	10,445	(1.6)	18	19
Business Advertising Europe	London	MJ	851	NA	3,011	NA	6	NA
FCB Cosby Paul	London	MJ	643	32.0	4,297	32.1	8	9
Mojo Britain	London	MJ	218	NA	1,450	NA	6	NA
CAMEROON			**Exchange rates: 0.003300/0.028060 Central African franc**					
Lintas:Cameroon	Douala	MN	477	21.0	3,184	21.0	8	8
CANADA			**Exchange rates: 0.747500/0.721000 Canadian dollar**					
Ogilvy & Mather	Toronto	MJ	23,719	29.1	158,205	29.1	425	348
J. Walter Thompson Co.	Toronto	MJ	19,152	15.1	127,683	15.1	336	385
Young & Rubicam	Toronto	MJ	18,489	24.7	121,953	22.9	355	308
The BCP Group	Montreal	NA	14,352	71.8	95,680	71.2	199	136
Vickers & Benson	Toronto	NA	13,728	4.6	91,494	7.5	NA	320
Cossette Communication-Marketing	Toronto	NA	13,533	19.7	90,223	19.7	320	252
Grey Advertising	Toronto	MJ	13,520	35.6	90,178	35.6	235	179
Foster Advertising	Toronto	NA	13,489	20.5	89,924	20.5	NA	492
Baker Lovick	Toronto	MJ	12,771	3.3	85,183	3.4	223	241
Leo Burnett Co.	Toronto	MJ	10,961	29.8	73,079	29.8	172	174
Saatchi & Saatchi Compton Hayhurst	Toronto	MJ	9,783	11.7	77,770	4.2	133	135
FCB/Ronalds-Reynolds	Toronto	MJ	9,554	105.2	63,727	105.2	242	84
Ted Bates Advertising	Toronto	MJ	9,327	7.4	70,276	18.6	159	158
DMB&B Canada	Toronto	MJ	6,250	0.8	41,609	0.2	116	124
Marketel/Publim	Montreal	NA	6,168	3.7	41,113	3.7	NA	88
SMW Advertising	Toronto	NA	5,606	29.6	37,375	29.6	115	NA
Scali, McCabe, Sloves (Canada)	Toronto	MJ	5,564	8.7	30,985	3.2	113	102
Miller Myers Bruce Dallacosta	Toronto	NA	4,149	16.2	27,658	16.2	NA	51
Lintas:Canada	Toronto	MJ	3,715	24.6	24,781	24.6	56	54
Kelley Advertising	Hamilton	JV	3,610	9.2	23,733	3.8	65	75
Kerr Advertising	Toronto	NA	3,048	8.3	22,986	19.4	48	46
Ian Roberts	Toronto	NA	2,915	15.6	19,435	15.2	NA	56
Ambrose, Carr, De Forest & Linton	Toronto	NA	2,837	8.4	18,912	7.5	44	40
Prism Communications	Montreal	NA	2,635	8.3	17,566	8.3	NA	35
Base, Brown & Partner	Toronto	NA	2,500	77.8	16,669	77.8	NA	20
Grant Tandy	Toronto	MJ	2,478	(38.8)	16,532	(38.8)	34	71
PNMD	Montreal	MN	2,385	27.2	21,678	20.3	54	44
Francis, Williams & Johnson	Calgary	NA	2,377	26.8	15,847	26.7	NA	73
Harrod & Mirlin	Toronto	MJ	2,243	NA	14,950	NA	23	NA
Enterprise Advertising Associates	Toronto	MJ	2,212	10.4	14,744	10.4	30	32
DDB Needham	Toronto	MJ	2,166	NA	25,938	NA	65	NA
Lowe Goodgoll	Toronto	MJ	2,018	27.2	14,576	39.4	28	23
Paul, Phelan & Perry	Toronto	NA	1,144	10.2	7,625	10.2	24	21
Palm Lintas Communications	Montreal	MN	1,110	NA	7,404	NA	26	NA
FCB/Provost	Montreal	JV	706	NA	4,715	NA	12	NA
BBDO Retail	Toronto	MJ	681	NA	4,542	NA	19	NA
Publicite Nationale	Montreal	NA	348	28.6	2,317	28.6	6	6
CHILE			**Exchange rates: 0.004300/0.005400**					
J. Walter Thompson Chilena	Santiago	MJ	2,787	4.9	18,579	4.9	145	145
Publiart/BBDO	Santiago	MN	1,606	14.6	10,712	14.6	88	77
Azocar, Morrison, Walker	Santiago	MN	1,139	2.6	7,594	2.6	53	45
Lintas:Chile	Santiago	MJ	1,076	12.5	7,179	12.5	71	66
Northcote y Asociados	Santiago	MN	968	49.3	6,450	49.3	59	45
Grey Chile	Santiago	MN	620	(2.3)	4,135	(2.3)	45	42
Young & Rubicam de Chile	Santiago	MJ	542	(5.2)	36,110	(5.2)	46	42
Leo Burnett-Chile	Santiago	MJ	477	(8.3)	3,180	(8.3)	44	40
Hermosilla, Zegers	Santiago	MN	409	(26.8)	2,745	(27.1)	32	34
CHINA			**Exchange rates: 0.270300/0.270300 renmibi**					
HDM-DYR Beijing	Beijing	NA	2,205	13.0	11,448	(12.0)	141	135
COLOMBIA			**Exchange rates: 0.004400/0.005400 peso**					
Torre Propaganda Sancho	Bogota	NE	3,245	79.4	13,735	74.7	142	NA
Leo Burnett-Colombia	Bogota	MJ	2,262	10.1	15,084	10.1	120	117
Atlas Publicidad	Bogota	NE	2,205	13.0	11,448	(12.0)	141	135
McCann-Erickson Colombia	Bogota	MJ	1,954	25.9	13,034	25.9	96	78
Atenas/BBDO	Bogota	NE	1,572	(13.7)	10,682	(8.3)	96	90
G. Meza & Ted Bates	Bogota	NE	1,457	77.2	9,718	77.2	70	87
Jaime Uribe & Asociados	Medellin	NA	1,167	41.8	7,781	41.8	45	45
Publicidad Artefilme	Cali	MJ	338	(15.2)	2,257	(15.2)	15	29
COSTA RICA			**Exchange rates: 0.016300/0.020300 colon**					
Alberto H. Garnier	San Jose	NE	1,578	5.5	10,523	5.5	100	100
McCann-Erickson Centroamericana	San Jose	MJ	1,106	(7.0)	7,376	(7.0)	47	43
FCB/Siboney	San Jose	MJ	561	15.6	3,740	15.6	35	27
APCU de Costa Rica	San Jose	MJ	306	(11.8)	2,043	(11.7)	33	27
CYPRUS			**Exchange rates: 2.070000/2.120000 pound**					
Impact/BBDO International	Nicosia	MN	1,012	(72.5)	6,754	(74.6)	105	111
DENMARK			**Exchange rates: 0.142100/0.119800 kroner**					
Ted Bates A/S	Copenhagen	MJ	15,209	53.1	107,253	56.2	182	180
scan-ad reklamebureau	Aarhus	NA	7,403	21.5	49,381	21.5	126	125
Team/BBDO Group Denmark	Copenhagen	MN	7,126	15.0	47,528	15.0	79	75
Young & Rubicam Copenhagen	Copenhagen	MJ	6,899	40.2	45,999	40.2	84	85
Lintas:Denmark	Copenhagen	MJ	5,948	34.7	39,670	26.5	75	66
Ogilvy & Mather	Copenhagen	MJ	4,442	14.6	23,403	5.7	71	73
Lyre & Valbo Reklamebureau	Copenhagen	NA	4,395	49.6	29,318	49.6	50	45
Gutenberghus Reklamebureau	Copenhagen	NA	4,201	16.7	29,310	17.7	65	63
Pro Reklame/Marketing	Copenhagen	NA	3,171	35.3	21,147	42.8	38	35
N/P Grey A/S	Egaa/Aarhus	MN	3,055	50.3	23,447	59.9	39	38
NP/3 Marketing	Aarhus	NA	2,888	31.5	19,260	31.5	47	40
ScanPartner Danmark	Copenhagen	NA	2,302	66.4	14,798	55.2	33	32
Leo Burnett Denmark	Copenhagen	MJ	2,189	19.7	14,595	19.7	32	33
Saatchi & Saatchi Advertising	Copenhagen	MJ	1,860	27.8	14,784	19.3	133	135
D'Arcy Masius Benton & Bowles	Copenhagen	MJ	1,838	21.0	14,196	14.0	30	34
J. Walter Thompson	Copenhagen	MJ	1,550	59.1	10,342	59.1	20	23
Bergenholz & Arnesen	Copenhagen	NA	1,302	16.0	12,711	(13.0)	24	26
DMB&B Ipsen & Parmo	Copenhagen	MJ	1,278	16.3	9,537	15.6	16	17
Grey-Denmark	Copenhagen	MJ	1,144	2.9	8,569	(0.7)	17	22
Lockey /FCB Denmark	Copenhagen	MJ	1,117	(13.4)	7,451	(13.4)	21	22
Dyppel Marketing/Reklame	Copenhagen	NA	1,066	959	7,105	31.8	20	20
DOMINICAN REPUBLIC			**Exchange rates: 1.00000/1.00000 DR dollar**					
Young & Rubicam Damaris	Santo Domingo	MJ	6,660	30.4	44,422	30.4	109	99
McCann-Erickson Dominicana	Santo Domingo	MJ	2,278	43.3	15,194	43.3	35	27
FCB/Siboney	Santo Domingo	MJ	443	NA	2,952	NA	22	22
Leo Burnett Co.	Santo Domingo	MJ	386	(5.9)	2,574	(5.9)	26	23
DUBAI			**Exchange rates: 0.275800/0.272500 dirham**					
Madco Gulf (Dubai)	Dubai	NA	1,280	12.8	5,500	22.2	35	33
ECUADOR			**Exchange rates: 0.006072/0.006940 sucre**					
Norlop Thompson Asociados	Guayaquil	MN	1,746	6.6	11,643	6.6	112	105
Veritas Publicitaria	Guayaquil/Quito	NE	1,398	65.9	7,549	45.6	100	62
McCann-Erickson (Ecuador)	Guayaquil	MJ	1,262	21.6	8,421	21.6	64	53
FCB/Artefilme	Guayaquil	MJ	371	23.9	2,477	23.9	28	34
EGYPT			**Exchange rates: 0.583700/0.745500 Egypt pound**					
Advertising & Marketing Associates	Cairo	NE	179	(20.4)	1,191	(20.4)	18	31

NOTES: All currency is given as U.S. dollars in thousands. Exchange rates are given for 1987 and 1986, respectively.

Agency	City	Owner-ship	Gross income	% chg	Billings	% chg	Work force 1987	1986
EL SALVADOR			**Exchange rates: 0.192500/0.201600 colon**					
Apex Publicidad	San Salvador	NE	851	NA	3,103	NA	55	NA
APCU de El Salvador	San Salvador	MN	461	4.9	3,074	5.0	36	35
FINLAND			**Exchange rates: 0.220600/0.193900 markka**					
SEK Advertising	Helsinki	NE	8,435	35.9	43,277	43.1	107	105
Oy Liikemainonta-McCann	Helsinki	MJ	8,340	25.6	55,628	25.6	111	115
Mainostoimisto Finnad-Bates	Helsinki	MJ	7,466	46.4	49,798	46.4	94	83
Markkinointi Viherjuuri Oy	Helsinki	NA	6,624	34.5	44,182	34.5	92	95
Mainosyhtyma Oy	Helsinki	NA	6,220	4.3	47,541	4.9	103	128
Erva-Latvala Oy	Helsinki	NA	5,236	11.1	34,927	11.1	82	91
Mainostoimisto MAS Oy	Helsinki	NA	5,027	22.3	33,530	22.3	93	109
Turkama & Kumppanit Oy	Helsinki	NA	4,924	11.9	32,844	11.9	65	85
Oy Mainos Taucher Reklam	Helsinki	NA	4,057	(11.9)	27,060	(11.9)	72	80
Lintas:Helsinki	Helsinki	MJ	3,835	20.5	25,580	23.0	58	60
Anderson & Lembke Oy	Helsinki	MJ	3,356	23.6	22,385	23.6	31	36
Oy AC-Ilmo	Helsinki	NA	3,047	(3.0)	25,966	0.3	40	52
Ogilvy & Mather Oy	Helsinki	MJ	2,822	33.3	22,169	35.2	42	39
Juniormainos Oy	Helsinki	NA	2,714	48.7	18,102	48.7	57	49
MK-mainos Oy	Helsinki	NA	2,710	(8.3)	18,076	(8.3)	56	74
Pekka Vainio ja Kumppanit	Helsinki	NA	2,650	13.9	9,229	14.7	40	41
Tehomainos-J. Walter Thompson Oy	Helsinki	MN	2,632	(11.8)	17,555	(11.9)	45	50
Adsek Oy	Tampere	NA	2,539	17.6	16,935	17.6	41	37
Interplan Oy	Helsinki	NE	2,473	25.0	15,798	19.2	37	38
Markkinointi Topitorma Oy	Helsinki	NA	2,451	45.3	16,348	45.3	34	34
Exitteams Oy	Helsinki	NA	2,319	NA	15,468	NA	30	NA
Markkinointiryhma Oy	Helsinki	NA	2,296	48.0	15,314	48.0	39	32
Asanti Konttinen Torkler Oy	Helsinki	MN	2,274	50.4	15,168	50.4	26	24
Kauppamainos Oy	Helsinki	NA	2,230	19.8	14,874	19.8	32	30
Creator Oy	Helsinki	NA	2,098	25.8	13,994	25.8	26	24
Mainostoimisto Varis Poteri	Helsinki	NA	2,076	12.7	13,847	12.7	31	33
Valotorni Oy	Helsinki	NA	2,009	15.4	13,400	15.4	NA	NA
Mainostoimisto U&M Oy	Helsinki	NA	1,855	16.7	12,373	16.6	28	33
Mainoskentta Oy	Tampere	NA	1,744	18.5	11,632	18.6	34	35
A-Mainos Oy	Tampere	NA	1,645	28.8	10,972	28.8	23	24
USP Helsinki Oy	Helsinki	NA	1,613	39.0	10,759	38.9	15	13
Adax-mainos Oy	Turku	NA	1,486	44.1	9,912	44.1	22	26
Mainostoimisto LSM Oy	Turku	NA	1,433	28.5	9,558	28.5	28	30
Mainostoimisto Oy Byroo	Helsinki	NA	1,373	18.9	9,158	18.9	14	14
Mainostoimisto Make Direct Oy	Helsinki	NA	1,369	39.8	9,131	39.8	16	15
Tampereen Taucher Oy	Tampere	NA	1,318	35.9	8,791	35.9	18	21
D'Arcy Masius Benton Bowles Oy	Helsinki	MJ	1,255	21.8	8,317	21.0	20	21
USP Turku Oy	Turku	NA	1,255	39.9	8,371	39.8	11	11
Mainos Lehmus Oy	Tampere	NA	1,214	(3.6)	8,097	(3.7)	23	25
Reklaminos Oy	Helsinki	NA	1,060	13.4	7,070	13.4	20	25
Oulun Taucher Oy	Oulu	NA	943	37.6	6,290	37.7	14	14
Markkinamainos Oy	Helsinki	NA	923	15.1	6,156	15.1	15	17
VSOP Oy	Tampere	NA	875	4.0	5,836	4.0	9	9
Mainostoimisto Rubiini Oy	Helsinki	NA	852	5.6	5,683	5.6	9	13
Mainostoimisto Aspekti Oy	Helsinki	NA	844	50.7	5,629	50.6	10	10
Seitsenmainos Oy	Helsinki	NA	844	93.9	5,629	93.8	10	10
Preesens-Mainosruusu Oy	Helsinki	NA	825	37.3	5,503	37.4	12	14
Mainostoimisto Remes	Helsinki	NA	787	69.1	5,249	69.1	12	10
Mainos up Oy	Helsinki	NA	783	51.7	5,225	51.7	7	6
Mainostoimisto Seiska 2 Oy	Helsinki	NA	692	(7.5)	4,616	(7.6)	7	9
Mainostoimisto Prax Oy	Helsinki	NA	687	35.6	4,582	35.6	7	7
Avant/BBDO	Helsinki	MN	662	79.8	2,208	62.7	NA	NA
Lahden Taucher Oy	Lahti	NA	643	6.9	4,289	7.1	15	21
Mainos H&K Oy	Oulu	NA	635	21.9	4,235	21.9	13	13
Mainosforum Oy	Helsinki	NA	613	107.5	4,089	107.8	10	7
Impacta Kosola & Rinkinen Oy	Helsinki	NA	596	16.8	3,975	16.8	7	8
Mainostoimisto Vesa Huhtanen Oy	Helsinki	NA	565	32.5	3,769	32.4	5	6
Mainostoimisto Hast Pasanen	Helsinki	NA	541	24.0	3,608	23.9	12	11
Mainostoimisto Kimalainen Oy	Vaasa	NA	528	10.8	3,522	10.7	11	11
Markkionointi Boomi Oy	Helsinki	NA	507	2.0	3,382	2.0	9	11
Mainostoimisto pk-mainos Oy	Tampere	NA	438	113.2	2,921	113.1	12	13
Liikekonsultit Oy	Helsinki	NA	292	33.4	1,948	33.5	7	8
Mainos Kunnas Oy	Helsinki	NA	265	24.2	1,768	24.2	6	6
Ajan Mainos Oy	Helsinki	NA	170	(17.3)	1,134	(17.3)	4	5
FRANCE			**Exchange rates: 0.162200/0.140300 franc**					
Publicis Conseil	Paris	NA	103,054	41.7	668,334	41.5	1,186	1,047
Belier	Neuilly	MJ	68,124	67.4	454,387	67.4	942	566
RSCG France	Paris	NA	67,800	36.1	454,160	38.2	420	380
HDM France	Neuilly	MJ	59,690	57.6	398,201	57.6	516	508
BDDP Group	Paris	NA	44,605	58.2	297,637	57.1	560	420
Polaris	Paris	JV	38,036	34.9	253,697	33.6	576	500
Lintas:Paris	Paris	MJ	33,400	54.4	222,778	50.1	246	145

NOTES: All currency is given as U.S. dollars in thousands. Exchange rates are given for 1987 and 1986, respectively.

Agency	City	Owner-ship	Gross income	% chg	Billings	% chg	Work force 1987	1986
Young & Rubicam France	Paris	MJ	32,925	29.5	219,430	29.5	458	451
Univas	Paris	MJ	32,764	13.9	218,970	13.1	350	425
DDB Needham	Paris	MJ	30,331	31.0	202,750	31.4	250	239
Saatchi & Saatchi Advertising	Paris	MJ	26,763	23.1	178,907	23.8	250	25
FCA!	Suresnes	MJ	18,410	30.8	122,793	30.8	200	197
Ogilvy & Mather France	Paris	MJ	17,518	41.1	116,784	41.4	175	150
McCann-Erickson France	Paris	MJ	16,831	30.3	112,262	30.3	175	161
FCB SA	Paris	MJ	15,312	31.5	102,129	31.5	166	168
Grey	Paris	MJ	14,991	74.0	99,992	74.5	146	97
J. Walter Thompson SA	Paris	MJ	14,654	26.6	97,742	26.6	144	154
CFP Alliance	Paris	MJ	14,436	25.5	96,185	25.6	NA	NA
TBWA	Paris	MJ	13,382	21.9	89,210	21.0	114	110
Ted Bates	Paris	MJ	11,354	35.6	NA	NA	100	103
CLM/BBDO	Paris	MJ	10,413	56.3	69,422	56.1	119	97
Synergie/Bozell, Jacobs	Paris	MJ	9,732	17.6	85,966	17.8	125	105
Bordelais Lemeunier/Leo Burnett	Paris	MJ	8,057	79.5	53,715	79.4	81	61
The Creative Business Intl.	Paris	MJ	7,623	81.1	50,769	80.9	NA	NA
Ogilvy Defrenois Direct	Paris	MJ	7,097	65.4	47,310	65.4	58	46
BCRC	Paris	NE	6,812	31.2	45,416	32.1	50	46
MAO	Neuilly	NA	6,512	23.4	43,470	22.0	50	46
D'Arcy Masius Benton & Bowles	Paris	MJ	6,260	1.7	19,781	(23.9)	75	88
Ayer France & Associes	Paris	MJ	4,866	31.6	32,440	31.7	38	32
Eldorado	Paris	MJ	4,671	78.1	34,338	72.7	29	22
RSCG Export	Issy	MJ	4,379	20.1	29,196	20.3	75	60
Ogilvy Zoe Medical	Paris	MJ	3,244	44.5	21,573	43.7	34	25
GGK International	Paris	MJ	2,831	(37.0)	15,997	(46.7)	24	50
CPV	Paris	MN	2,757	26.8	20,275	29.0	27	26
Lowe Lichtenberg Faucher	Boulogne	MJ	2,433	(30.1)	16,230	(40.9)	17	NA
OPF Univas	Paris	MJ	1,608	33.8	7,283	21.3	24	24
Herald	Paris	NA	866	114.1	2,287	17.9	5	5
Mix Communications	Paris	MJ	730	108.1	4,868	108.1	5	6
WEST GERMANY			**Exchange rates: 0.539700/0.443600 mark**					
Team/BBDO Group	Duesseldorf	MJ	45,074	28.6	300,641	28.6	463	436
Lintas:Germany	Hamburg/Frankfurt	MJ	44,071	39.5	293,955	39.3	439	394
McCann-Erickson Germany	Frankfurt	MJ	38,213	38.7	254,881	38.7	428	336
Ogilvy & Mather	Frankfurt	MJ	37,393	35.1	224,515	9.6	389	385
Grey Duesseldorf	Duesseldorf	MJ	28,658	39.8	191,216	54.3	305	300
Young & Rubicam	Frankfurt	MJ	28,516	39.6	190,507	39.6	347	320
Ted Bates Werbeagentur	Frankfurt	MJ	27,417	33.2	182,958	33.3	281	274
J. Walter Thompson Co.	Frankfurt	MJ	25,105	7.9	167,377	7.9	314	341
Saatchi & Saatchi Advertising	Frankfurt	MJ	20,023	18.2	133,726	18.4	203	206
Eggert Werbeagentur	Duesseldorf	MN	19,463	37.5	129,798	37.6	217	198
DDB Needham	Duesseldorf	MJ	19,429	38.1	130,607	22.6	238	NA
Michael Conrad & Leo Burnett	Frankfurt	MJ	17,765	39.3	118,441	39.2	217	199
Wilkens Ayer	Hamburg	MN	17,709	29.9	126,312	25.7	231	226
D'Arcy Masius Benton & Bowles	Frankfurt	MJ	16,456	37.7	109,762	37.7	214	206
Scholz & Friends	Hamburg	MJ	16,353	46.3	109,073	46.3	168	145
Lowe Luerzer	Frankfurt	MJ	14,361	100.5	95,786	100.5	170	104
GGK Communication	Duesseldorf/Frank-furt	MJ	13,654	14.0	91,209	14.9	140	132
Publicis Germany	Duesseldorf/Frank-furt	MJ	12,764	26.2	85,136	26.2	125	120
TBWA	Frankfurt	MJ	12,413	12.1	82,795	12.2	122	106
Heye & Partner	Munich	NA	11,442	22.2	76,314	22.3	120	123
Baums, Mang und Zimmermann	Duesseldorf	MN	11,064	22.7	73,669	22.5	113	112
HDM Duesseldorf	Duesseldorf	MJ	10,956	28.0	73,399	28.3	95	93
Service Plan	Munich	NA	9,715	28.1	64,818	28.1	89	78
Guenter Blaese	Stuttgart	NA	9,553	26.7	63,739	26.7	111	109
von Mannstein Gruppe	Solingen	NA	8,967	22.0	59,799	22.0	80	83
Bessere Werbung	Duesseldorf	NA	8,257	29.3	55,103	29.4	69	43
Springer & Jacoby	Hamburg	NA	8,203	92.6	54,726	92.8	83	63
Economia	Hamburg	NA	8,042	27.7	53,646	27.7	91	87
Lueders	Cologne	NA	7,610	24.3	50,732	24.3	48	48
Spiess & Ermisch	Duesseldorf	NA	7,610	27.1	50,732	27.1	60	70
Hildmann Simon Rempen & Schmitz/SMS	Duesseldorf	MJ	7,448	33.3	49,652	31.7	66	53
RSCG, Butter, Rang	Duesseldorf	MJ	7,016	63.1	46,009	64.6	67	55
Ernst & Partner	Duesseldorf	NA	6,854	38.0	45,713	38.0	81	95
MWI Markenwerbung	Hamburg	MJ	6,505	21.7	43,389	21.7	86	88
Borsch, Stengel & Partner	Frankfurt	NA	6,476	35.2	43,176	35.2	67	60
FCB Deutschland	Frankfurt	MJ	5,624	24.5	37,510	24.5	51	75
Wensauer & Partner	Stuttgart	NA	5,397	58.0	35,998	57.9	56	45
Agenta Werbeagentur	Muenster	NA	4,965	34.9	33,138	34.8	59	52
Werbeagentur Wuendrich-Meissen	Stuttgart		4,621	36.6	30,825	46.3	47	49
Acon	Cologne	NA	4,318	(18.2)	28,820	(18.2)	52	59
Hakuhodo	Duesseldorf	MJ	4,264	9.2	28,442	9.2	53	45
Die Gilde Werbeagentur	Hamburg	NA	3,670	36.1	24,394	35.8	38	34
Die Werbe Euro-Advertising	Duesseldorf	NA	3,454	18.0	23,045	18.1	29	32

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Agency	City	Owner-ship	Gross income	% chg	Billings	% chg	Work force 1987	Work force 1986
Durana Ketchum	Frankfurt	MN	2,958	45.5	19,915	47.7	15	19
INEX	Koblenz	NA	2,423	24.1	16,191	24.6	25	16
Erdmann & Partner	Duesseldorf	NA	2,412	8.7	16,087	8.7	22	29
MSH Bozell Jacobs Werbeagentur	Duesseldorf	MN	1,403	NA	9,445	NA	18	NA
Wirz & Hafner Werbeberatung	Frankfurt	MJ	1,133	50.3	7,560	49.5	13	11
GREECE			**Exchange rates: 0.007300/0.007100 drachma**					
Spot/Thompson Advertising	Athens	MN	3,449	53.0	27,740	50.3	86	75
Bold Advertising	Athens	NA	2,759	43.1	19,345	43.4	64	56
Adel/Saatchi & Saatchi	Athens	MJ	2,044	65.5	13,140	53.0	49	45
Lintas:Athens	Athens	MJ	1,878	62.1	12,526	49.3	42	35
Euro-Leo Burnett Athens	Athens	MJ	1,813	56.9	12,087	56.9	57	50
BBDO/Athens	Athens	MJ	1,516	19.7	10,112	31.4	64	69
Gnomi/FCB	Athens	MN	1,379	74.3	9,197	74.3	56	54
McCann-Erickson (Hellas)	Athens	MJ	1,371	40.7	9,144	40.7	44	43
Olympic DDB Needham	Athens	MN	1,314	68.2	8,764	56.8	37	30
J.N. Leoussis Advertising	Athens	NA	1,256	57.9	8,375	57.9	43	30
Alector Advertising	Athens	NA	1,166	43.3	8,395	35.8	40	38
Ted Bates Advertising	Athens	MJ	950	20.1	6,380	21.4	42	40
Gralis Advertising	Athens	MN	840	90.7	5,599	90.7	32	29
Echo Advertising	Athens	NA	575	18.6	4,117	20.6	29	29
DMB&B Ergon	Athens	MJ	497	49.9	3,307	49.4	22	22
Geo II Advertising	Athens	NA	473	77.7	3,380	44.8	19	15
Lamda Alpha Advertising	Athens	NE	414	(12.4)	3,330	(15.5)	21	21
Epsilon-Epsilon	Athens	NA	282	26.7	2,175	22.1	18	18
Sigma Ltd.	Athens	NA	177	8.6	1,179	8.5	17	17
Chapman/Palavidis	Athens	NA	162	35.1	1,314	32.2	12	11
GUATEMALA			**Exchange rates: 0.400000/0.400000 quetzal**					
APCU Thompson	Guatemala City	MN	1,375	3.3	9,157	3.3	42	40
McCann-Erickson Centroamericana	Guatemala City	MJ	940	28.6	6,267	28.6	54	50
Communica Publicidad	Guatemala City	NE	747	NA	4,982	NA	47	NA
FCB Siboney	Guatemala City	MJ	636	24.4	4,241	24.4	63	57
Publimerca	Guatemala City	NE	228	51.7	1,140	51.7	30	26
HONDURAS			**Exchange rates: 0.436700/0.435900 lempira**					
McCann-Erickson Centroamericana	Tegucigalpa	MJ	666	26.5	4,445	26.4	36	29
APCU de Honduras	Tegucigalpa	MJ	231	10.2	1,542	10.2	24	20
Publicidad Creativa	San Pedro Sula	NE	NA	NA	NA	NA	NA	NA
HONG KONG			**Exchange rates: 0.128200/0.128200 Hong Kong dollar**					
Leo Burnett Ltd.	Hong Kong	MJ	6,861	21.1	45,741	21.0	173	168
Ogilvy & Mather	Hong Kong	MJ	6,071	12.2	40,494	12.2	141	135
J. Walter Thompson Co.	Hong Kong	MJ	4,750	58.6	31,680	58.7	122	93
Ted Bates Ltd.	Hong Kong	MJ	3,912	34.7	25,695	20.2	115	105
HDM-DYR Hong Kong	Hong Kong	NA	3,551	15.2	23,982	15.8	98	90
McCann-Erickson	Hong Kong	MJ	3,167	7.6	21,126	7.6	86	86
Saatchi & Saatchi Advertising	Hong Kong	MJ	2,364	2.5	15,769	2.5	65	60
Lintas (Hong Kong)	Hong Kong	MJ	2,346	2.5	15,645	2.5	74	89
DDB Needham Worldwide	Hong Kong	MJ	2,177	1.0	13,205	(8.2)	69	65
Bali Partnership	Hong Kong	MJ	2,160	78.5	14,404	78.9	110	NA
Foote, Cone & Belding	Hong Kong	MJ	1,935	6.8	12,907	6.8	55	58
People & Grey Advertising	Hong Kong	MJ	1,846	30.4	12,307	30.4	60	52
BBDO Hong Kong	Hong Kong	MJ	1,845	12.9	12,304	15.6	98	58
Synergie Communications	Hong Kong	MN	1,668	31.2	8,342	24.8	NA	43
Bozell, Jacobs, Kenyon & Eckhardt	Hong Kong	MJ	1,334	30.1	8,895	30.1	50	43
Results (HK)	Hong Kong	MJ	1,081	22.4	7,212	22.4	29	29
Mojo Hong Kong	Hong Kong	MJ	985	225.0	6,563	246.6	33	NA
Far East-Ketchum Advertising	Hong Kong	MJ	974	4.8	6,496	4.8	35	35
DMB&B Modern Advertising	Hong Kong	JV	965	10.5	6,435	10.5	47	36
Lee Davis Ayer	Hong Kong	MJ	923	70.1	6,154	40.3	39	33
Hong Kong (FE) Advertising	Hong Kong	MJ	863	1.1	5,752	1.1	30	33
Chyo Senko Advertising	Hong Kong	NA	357	(7.1)	2,009	(16.6)	NA	NA
ICELAND			**Exchange rates: 0.032400/0.032400 kroner**					
Olafur Stephensen Advertising	Reykjavik	NA	1,874	14.6	3,416	23.4	33	26
INDIA			**Exchange rates: 0.077100/0.080500 rupee**					
Lintas:India	Bombay	MN	7,585	58.4	50,584	58.4	275	237
Hindustan Thompson Associates	Bombay	NE	7,482	39.5	49,884	39.5	777	715
Ogilvy Benson & Mather	Bombay	MN	3,549	19.9	23,669	19.9	339	310
Clarion Advertising Services	Calcutta	NE	3,434	20.6	22,908	20.6	547	513
Everest Advertising	Bombay	MN	3,260	41.4	21,744	35.5	305	237
Ulka Advertising	Bombay	NA	2,950	17.7	19,661	20.5	368	342
R.K. Swamy Advertising Associates	Madras	NE	2,891	22.2	19,275	22.2	276	273
Chaitra Advertising	Bombay	NE	2,089	6.0	13,924	6.0	214	220
Contract Advertising	Bombay	NE	1,951	60.5	13,004	60.4	211	197
Advertising & Sales Promotion	New Delhi	NA	1,821	3.4	10,116	3.4	310	304
daCunha Associates	Bombay	NA	1,580	56.0	8,320	23.4	74	66
Creative Unit	Bombay	NA	745	23.8	4,969	23.8	54	53
Contour Advertising	Bombay	NA	502	9.4	3,238	34.1	67	56

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Agency	City	Owner-ship	Gross income	% chg	Billings	% chg	Work force 1987	Work force 1986
Raka Advertising & Marketing	Bombay	NA	345	13.8	1,884	4.5	46	42
Adverts	Bombay	NA	191	18.2	786	(24.6)	28	26
INDONESIA			**Exchange rates: 0.000609/0.000841 rupiah**					
P.T. Citra:Lintas Indonesia	Jakarta	NE	2,437	(6.5)	16,256	(6.5)	93	77
Matari Inc.	Jakarta	NE	1,715	(12.5)	7,902	(10.5)	184	177
Fortune	Jakarta	NE	1,279	52.8	8,526	42.8	NA	45
AdForce-JWT	Jakarta	NE	878	84.1	5,796	131.5	63	41
DMB&B Perwanal	Jakarta	MN	374	(17.7)	2,497	(1.0)	46	40
Sulisto/BBDO	Jakarta	NE	229	(17.5)	3,320	(18.9)	29	36
IRELAND			**Exchange rates: 1.445000/1.313000 pound**					
Wilson & Hartnell	Dublin	MJ	6,089	156.2	40,490	156.3	141	60
McConnells	Dublin	NA	3,785	11.2	25,085	11.3	107	104
O'Kennedy-Brindley	Dublin	MJ	3,592	44.0	17,500	36.0	58	60
Hunter Advertising	*Dublin*	*MJ*	*2,312*	9.4	13,726	16.9	34	33
Peter Owens	Dublin	NA	2,234	14.3	13,735	22.9	48	42
Brian Cronin & Associates	Dublin	NA	2,168	27.0	11,271	24.4	33	32
Arks Alliance	Dublin	MJ	1,792	36.5	11,936	36.5	NA	NA
Young Alliance	Dublin	MJ	1,561	10.8	10,404	10.8	NA	NA
CDP Associates Ltd.	Dublin	NA	1,539	(8.1)	10,260	(8.1)	NA	NA
O'Keeffe's Ltd.	Dublin	NA	1,321	17.6	8,526	17.7	23	23
Southern Advertising Group	Cork	NA	325	32.4	2,168	32.1	NA	NA
D'Arcy Masius Benton & Bowles	Dublin	MJ	149	169.9	993	170.0	7	4
ISRAEL			**Exchange rates: 0.631600/1.000000 shekel**					
Bing-Linial Advertising	Tel Aviv	NA	5,200	30.0	34,000	36.0	32	32
OK Marketing & Advertising	Tel Aviv	NA	4,600	53.3	30,000	50.0	26	26
Ariely Communications Group	Tel Aviv	NA	3,750	25.0	20,000	17.6	105	95
Tamir Cohen (Jacobsen)	Tel Aviv	NA	3,000	36.4	20,000	33.3	50	42
Gitam Image Promotions	Tel Aviv	NA	2,700	50.0	18,000	38.5	60	60
Pelled Ltd.	Tel Aviv	NA	1,320	(15.4)	9,790	(18.4)	37	33
Warshavsky Freilich Dover	Tel Aviv	NE	1,300	73.3	9,000	80.0	38	28
ITALY			**Exchange rates: 0.000755/0.000648 lira**					
McCann-Erickson Italiana	Milan	MJ	31,908	37.9	212,826	37.9	335	298
MAC Group Italia	Milan/Rome	NA	31,776	126.0	176,404	91.0	201	131
Armando Testa	Turin	NA	29,068	48.5	197,055	49.8	278	241
Young & Rubicam Italia	Milan	MJ	28,615	47.2	190,653	45.2	264	199
J. Walter Thompson Italia	Milan	MJ	23,593	31.6	157,286	31.6	212	222
Belier Comunicazione	Milan	MJ	21,506	30.2	143,450	30.2	160	155
Italia/BBDO	Milan	MN	20,951	59.7	139,675	59.7	155	112
Saatchi & Saatchi Advertising	Rome/Milan	MJ	17,818	27.3	151,755	62.6	170	126
SSC&B:Lintas	Milan	MJ	16,839	73.8	112,312	64.5	155	122
Livraghi, Ogilvy & Mather	Milan/Rome	MN	15,618	49.1	104,173	49.1	156	132
Foote, Cone & Belding	Milan	MJ	15,149	(1.2)	101,043	(1.2)	130	147
Milano & Grey	Milan	MJ	14,647	70.0	107,210	77.9	105	90
D'Arcy Masius Benton & Bowles	Milan	MJ	14,490	47.6	96,646	48.4	179	163
TBWA Italia	Milan/Rome	MJ	14,081	37.9	113,250	39.8	112	112
Publinter Ayer	Milan	MJ	9,622	95.9	80,030	139.9	88	63
Pirella Goettsche Lowe	Milan	MJ	9,585	67.0	77,765	81.4	87	67
Leo Burnett Italy	Milan	MJ	8,267	58.5	55,115	57.5	77	69
RSCG Mezzano Costantini	Milan	MJ	8,116	49.1	92,001	78.7	71	62
Promarco Advertising	Milan	NA	7,173	38.4	28,690	47.6	30	30
Bozell, Jacobs, Kenyon & Eckhardt	Milan/Rome	MJ	6,644	55.3	55,493	54.9	85	56
HDM-WE	Milan	MJ	6,569	42.4	63,420	106.0	52	50
Ted Bates & Co.	Milan	MJ	5,989	12.3	45,673	12.2	69	70
B Communications	Milan	NA	5,466	51.7	48,411	51.8	47	45
P&T Company	Milan	NA	4,908	37.7	47,565	52.9	45	42
CBC	Milan	NA	4,371	20.9	29,143	20.9	34	34
GGK Milano	Milan	MJ	3,337	25.6	25,670	32.0	26	24
AdMarCo	Milan/Florence	NA	3,171	43.4	31,710	57.9	33	30
Associati Globe	Milan	NA	2,794	87.4	16,837	89.7	23	21
Publicis Milano	Milan	MJ	2,536	56.2	23,123	69.3	29	31
Pubblimarket Alliance	Milan/Udine	MJ	2,350	22.2	18,380	35.7	NA	NA
Broucc/Doyle Dane Bernbach	Milan	MJ	2,039	113.2	32,465	375.8	29	17
Gandin & Associati	Milan	NA	1,950	60.9	13,200	77.6	NA	NA
Tonic/ECOM	Milan	MJ	1,827	21.7	12,193	21.8	27	24
Pubbli Dan Wirz	Milan	MN	906	7.5	6,043	7.5	12	15
Adver Pubblicita e Marketing	Padua	NA	815	55.3	4,908	51.5	14	13
Kik Promotion	Milan	MJ	799	NA	2,396	NA	6	NA
Pragma	Milan	MJ	449	NA	2,993	NA	5	NA
IVORY COAST			**Exchange rates: 0.003300/0.028060 Central African Franc**					
Lintas Abidjan	Abidjan	MJ	1,400	(84.2)	9,338	(84.2)	13	15
JAMAICA			**Exchange rates: 0.178300/0.192700 Jamaica dollar**					
Dunlop Corbin Advertising	Kingston	MJ	1,010	15.1	6,737	15.0	40	40
McCann-Erickson (Jamaica)	Kingston	MJ	871	16.6	5,812	16.6	45	39
CGR Communications Ltd.	Kingston	NA	685	(3.8)	2,789	(1.0)	23	32
Lindo, Foote, Cone & Belding	Kingston	MN	389	29.7	2,592	29.6	29	26

NOTES: All currency is given as U.S. dollars in thousands. Exchange rates are given for 1987 and 1986, respectively.

Agency	City	Owner-ship	Gross income	% chg	Billings	% chg	Work force 1987	Work force 1986
JAPAN				**Exchange rates: 0.006699/0.005769 yen**				
Dentsu Inc.	Tokyo	NA	884,527	29.9	6,775,436	27.5	5,759	5,673
Hakuhodo Inc.	Tokyo	NA	383,413	23.8	2,896,743	27.3	3,020	2,957
Tokyu Agency	Tokyo	NA	113,930	36.0	826,821	27.8	767	742
Dai-Ichi Kikaku	Tokyo	NA	109,424	10.8	836,660	15.5	626	574
Daiko Advertising	Osaka	NA	107,096	30.5	879,869	26.8	1,317	1,370
Asatsu	Tokyo	MN	73,354	43.5	489,272	22.1	694	626
I&S Corp.	Tokyo	NA	65,823	27.0	540,424	35.6	750	700
Yomiko Advertising	Tokyo	NA	64,676	32.2	477,278	31.9	670	673
McCann-Erickson Hakuhodo	Tokyo	MJ	62,287	23.7	415,457	23.7	474	467
Asahi Advertising	Tokyo	NA	54,387	22.1	340,612	21.4	771	793
Chuo Senko Advertising	Tokyo	NA	37,414	17.4	269,193	19.9	303	301
Nihon Keizaisha Advertising	Tokyo	NA	34,475	34.9	205,366	34.5	476	463
Orikomi Advertising	Tokyo	NA	30,400	21.8	311,800	29.2	352	355
J. Walter Thompson Co. Japan	Tokyo	MJ	29,317	27.2	195,543	27.2	285	311
Man-Nen-Sha Inc.	Osaka	NA	28,974	14.2	413,031	21.7	487	492
Kyodo Advertising	Tokyo	NA	28,255	35.2	221,590	31.4	399	398
HDM-DYR KK	Tokyo	NA	25,831	29.8	NA	NA	237	221
Meitsu Advertising	Tokyo	NA	25,510	27.7	159,436	27.7	280	275
Tokyu Agency International	Tokyo	NA	22,322	41.0	174,135	41.2	229	210
Nihon Keizai Advertising	Tokyo	NA	21,698	34.3	155,008	34.3	300	286
Standard Advertising	Tokyo	NA	15,411	26.1	119,242	37.8	196	180
Osaka Yomiuri Advertising	Osaka	NA	12,819	18.7	98,609	18.7	285	287
Nambokusha Inc.	Tokyo	MJ	12,219	31.2	91,642	25.2	142	161
Grey Daiko Advertising	Tokyo	JV	9,982	16.4	66,575	16.4	134	134
Hakuhodo:Lintas	Tokyo	JV	9,005	195.8	60,067	195.8	61	51
Dai-Ichi Tsushin-Sha	Tokyo	NA	6,296	22.0	48,434	22.0	101	102
Leo Burnett-Kyodo	Tokyo	MJ	6,149	22.6	40,993	22.6	70	54
Sanyu Agency	Tokyo	MJ	5,662	6.2	41,942	7.8	NA	NA
Toei Advertising	Tokyo	NA	4,743	30.9	39,410	37.8	60	56
Saatchi & Saatchi Advertising	Tokyo	MJ	4,650	NA	31,001	NA	NA	NA
Cove-Ito Advertising	Tokyo	NA	3,718	53.4	10,049	45.2	32	28
Orikomi Bates	Tokyo	MN	3,702	82.5	31,859	70.6	38	29
Ketchum Advertising (Japan)	Tokyo	MJ	2,562	38.4	16,683	32.8	26	23
Meitsu/BJKE	Tokyo	MN	1,843	19.1	10,054	15.4	24	22
Dentsu Sudler & Hennessey	Tokyo	MJ	1,685	59.1	NA	NA	15	11
DDB Needham Sanyu DIK	Tokyo	MN	926	NA	6,172	NA	8	NA
Daiko/FCB Impact	Tokyo	JV	636	NA	4,244	NA	6	NA
Foote, Cone & Belding	Tokyo	MJ	560	62.7	3,737	62.7	4	10
Ogilvy & Mather (Japan)	Tokyo	MJ	511	(9.3)	3,409	(9.3)	8	7
KENYA				**Exchange rates: 0.078300/0.070400 shilling**				
McCann-Erickson (Kenya)	Nairobi	MJ	1,012	33.1	6,747	33.1	41	41
KUWAIT				**Exchange rates: 3.542500/3.542500 dinar**				
Madco Kuwait	Kuwait	NA	358	8.5	1,760	17.3	8	7
LEBANON				**Exchange rates: 0.008880/0.038700 Lebanese pound**				
H&C Leo Burnett	Beirut	NE	1,765	(36.0)	11,768	(36.0)	58	79
Enterprise Middle East	Athens/Beirut	MJ	325	9.4	2,167	9.4	4	4
Madco Beirut	Beirut	NA	80	6.7	675	12.5	6	6
MALAWI				**Exchange rates: 0.198000/0.548100 kwacha**				
Graphic:Lintas Malawi	Blantyre	MN	41	(56.6)	275	(46.4)	20	20
MALAYSIA				**Exchange rates: 0.403300/0.433000 Malaysian dollar**				
Ogilvy & Mather	Kuala Lumpur	MN	3,284	(7.3)	21,905	(7.3)	138	132
AMC Saatchi & Saatchi Advertising	Kuala Lumpur	MN	2,630	15.0	17,529	15.0	58	58
PTM Thompson Advertising	Kuala Lumpur	MN	2,279	(6.0)	15,192	(6.1)	103	107
Leo Burnett	Kuala Lumpur	MN	2,226	2.4	14,842	2.4	84	83
McCann-Erickson Malaysia	Kuala Lumpur	MN	1,833	10.5	12,224	10.5	62	35
SSC&B:Lintas Malaysia	Kuala Lumpur	MJ	1,604	(14.7)	10,699	(14.7)	68	70
KHK Needham	Kuala Lumpur	MN	1,371	NA	12,099	NA	65	NA
Ted Bates (Malaysia)	Kuala Lumpur	MN	1,240	(6.3)	6,461	(21.0)	71	63
AP:Foote, Cone & Belding	Kuala Lumpur	MN	1,146	17.4	7,645	17.4	66	60
HDM-DYR Malaysia	Kuala Lumpur	NA	968	8.8	NA	NA	44	44
Wings BBDO	Selangor	MJ	954	4.9	6,362	4.9	59	60
Ball Partnership	Kuala Lumpur	MJ	619	17.6	4,128	18.8	34	NA
Francis Lim Zulkifli & Ayer	Kuala Lumpur	MN	411	0.2	1,850	10.6	28	30
Grey Advertising (Malaysia)	Kuala Lumpur	MN	352	53.3	2,351	53.4	20	NA
Chuo Senko Advertising	Kuala Lumpur	NA	224	NA	1,305	NA	NA	NA
Grant Advertising	Selangor	MN	NA	NA	NA	NA	17	22
Bozell, Jacobs, Kenyon & Eckhardt	Selangor	MN	NA	NA	NA	NA	42	47
MEXICO				**Exchange rates: 0.000865/0.001820 peso**				
Publicidad Ferrer	Mexico City	NA	5,444	(6.1)	36,297	(6.1)	150	53
McCann-Erickson	Mexico City	MJ	4,968	(5.7)	33,135	(5.7)	250	242
Noble y Asociados	Mexico City	MJ	3,466	(20.0)	23,238	(8.8)	268	346
Garcia Patto International	Mexico City	NA	3,425	(4.9)	22,819	(4.9)	90	92
J. Walter Thompson de Mexico	Mexico City	MJ	3,055	(30.6)	20,368	(30.6)	170	178
Leo Burnett SA	Mexico City	MJ	2,835	7.6	18,898	7.6	123	123
Panamericana Ogilvy & Mather	Mexico City	MJ	2,421	9.2	15,453	5.7	130	125
Young & Rubicam	Mexico City	MJ	1,870	(5.2)	12,472	(5.2)	124	106
Scali, McCabe, Sloves de Mexico	Mexico City	MJ	1,631	41.6	10,874	41.6	74	58
Bozell, Jacobs, Kenyon & Eckhardt	Mexico City	MN	1,507	(4.0)	10,044	(4.0)	84	87
FCB/Maqueda Gibert	Mexico City	MJ	1,493	134.4	9,959	134.4	113	50
Dieste, Merino/BBDO	Mexico City	MN	1,374	4.6	9,920	9.2	55	48
Publicidad D'Arcy	Mexico City	MJ	1,330	45.6	8,872	39.5	93	80
Iconic	Mexico City	NE	1,228	(22.6)	8,184	(22.5)	70	62
DDB Needham	Mexico City	MJ	1,168	NA	7,941	NA	71	70
Paulino Romero	Mexico City	NA	1,148	(27.5)	7,596	(27.2)	104	104
Lintas:Mexico	Mexico City	MJ	1,005	5.2	6,703	5.2	68	68
Grey Mexico	Mexico City	MJ	962	50.5	6,417	56.8	54	46
Montenegro-Saatchi & Saatchi	Mexico City	MJ	709	12.2	4,723	12.1	34	28
NAMIBIA				**Exchange rates: 0.406700/0.429400 rand**				
Lintas:Namibia	Windhoek	MJ	14	15.0	94	16.5	1	1
NETHERLANDS				**Exchange rates: 0.479600/0.393400 guilder**				
FHV/BBDO Group	Amstelveen	MJ	25,959	45.8	173,062	45.8	302	261
PMSvW/Young & Rubicam	Amsterdam	MJ	19,759	31.0	131,726	31.0	231	204
Ogilvy & Mather (Nederland)	Amsterdam	MJ	18,098	48.5	120,712	48.5	253	215
Lintas:Netherlands	Amsterdam	MJ	14,570	97.0	97,187	76.7	165	113
PPGH Groep	Amsterdam	NA	12,463	46.5	83,085	46.5	101	83
Prad Alliance	Amsterdam	MJ	10,539	43.3	70,256	42.9	NA	NA
Saatchi & Saatchi Advertising	Amsterdam	MJ	9,909	15.0	64,560	12.4	119	110
McCann-Erickson (Nederland)	Amsterdam	MJ	8,663	24.2	57,783	24.2	101	103
ARA BV	Rotterdam	MJ	7,708	23.5	51,388	23.5	81	76
Noordervliet & Winninghoff/LB	Amsterdam	MJ	6,964	11.1	46,427	11.1	87	114
Doyle Dane Bernbach	Amsterdam	MJ	5,743	NA	38,288	NA	69	NA
Result	Badhoevedorp	MJ	5,586	20.9	37,257	20.9	56	70
Geudeker & Oerlemans Groep	Amstelveen	NA	5,492	42.7	36,613	42.7	75	45
Grey Advertising	Amsterdam	MJ	5,375	73.1	35,849	73.3	52	54
TBWA Groep	Amstelveen	MJ	5,265	25.1	35,129	24.2	74	51
Publicis	Amsterdam	MJ	5,077	16.0	33,863	16.0	67	72
Ted Bates Co.	Amsterdam	MJ	5,069	19.5	32,025	2.8	54	77
J. Walter Thompson Co.	Amsterdam	MJ	4,702	(12.5)	31,361	(12.5)	71	95
HDM	The Hague/Amsterdam	MJ	4,449	4.7	29,673	4.8	52	68
HVR Alliance	The Hague	MJ	3,929	4.0	26,179	4.0	NA	NA
D'Arcy Masius Benton & Bowles	Amsterdam	MJ	3,887	8.0	25,910	8.0	46	55
De Bussy	Diemen	NA	3,475	78.4	23,164	78.4	60	38
Baas & van Haastrecht	Rotterdam	NA	3,295	35.9	21,968	35.9	41	38
GGK	Amsterdam	MJ	3,249	29.6	21,701	29.8	36	38
Belinfante Major	The Hague	NA	3,231	30.3	21,537	30.3	42	38
Ayer Nederland	Deventer	MJ	2,340	(13.5)	13,090	1.6	35	43
Schulte & Partners	Lochem	NA	2,161	40.8	14,406	40.3	26	24
FCB Nederland	Amsterdam	MJ	2,158	(28.8)	14,393	(28.8)	34	51
Van Jaarsveld/Fontein Alliance	Eindhoven	MJ	2,091	30.6	13,975	31.1	NA	NA
ARVH Kommunikatie	Zaandam	NA	2,010	6.5	13,401	6.5	23	19
Klein & Partners	Amsterdam	MJ	2,010	54.8	13,401	54.8	22	18
HLBP	Amsterdam	NA	2,010	46.8	13,401	46.8	28	22
Lowe Nederland	Amsterdam	MJ	1,760	37.6	11,738	37.6	18	17
RSCG Van Diggele, Janzen, Schoenmaker	Amsterdam	MJ	1,600	20.2	9,716	24.4	17	18
Push & Grey	Rotterdam	ND	1,472	20.7	9,822	20.7	16	12
Continental Advertising	The Hague	NA	1,441	NA	9,607	NA	13	NA
Smits & Palm Advertising	Amsterdam	NA	1,292	31.4	11,008	27.2	13	15
Anderson & Lembke Nederland	Landsmeer	MJ	293	72.2	2,478	79.6	6	4
NEW ZEALAND				**Exchange rates: 0.576000/0.525200 NZ dollar**				
Colenso Communications	Auckland	MN	9,475	64.3	47,373	64.3	NA	NA
Mackay King Advertising	Auckland	NE	7,914	88.9	39,574	84.7	81	73
Saatchi & Saatchi Advertising	Wellington	MJ	5,363	42.3	24,267	28.8	NA	77
DDB Needham	Auckland	MJ	4,702	3.4	31,364	34.7	69	96
D'Arcy Masius Benton & Bowles	Auckland	MJ	4,310	13.3	23,064	15.2	68	75
Rialto Advertising	Auckland	MN	4,208	74.4	21,042	74.4	NA	NA
Ted Bates New Zealand	Wellington	MN	4,207	31.4	22,902	23.3	63	72
Ogilvy & Mather	Wellington	MJ	4,097	30.8	20,483	30.8	92	95
Dobbs-Wiggins McCann-Erickson	Auckland	MJ	3,900	22.3	26,010	22.3	59	73
Lintas:New Zealand	Auckland	MJ	2,469	36.5	16,470	85.7	46	46
Leo Burnett-New Zealand	Auckland	MJ	2,066	(15.2)	13,775	13.1	47	40
Young & Rubicam/GSI	Auckland	MJ	2,016	NA	13,539	NA	35	NA
MacHarman Ayer	Auckland	MJ	1,750	22.6	11,677	22.6	28	28
Hutcheson Knowles Marinkovich	Auckland	MN	1,548	75.8	7,740	75.8	NA	NA
Mainstream/FCB	Auckland	MN	879	(8.9)	5,866	(8.9)	16	23
Ball Partnership	Auckland	MJ	729	NA	3,168	NA	14	NA
Ward & Grey	Auckland	MN	615	18.9	3,076	24.7	12	11
Mojo N.Z.	Auckland	MJ	225	NA	1,501	NA	6	NA
NORWAY				**Exchange rates: 0.144700/0.134300 kroner**				
Ted Bates A/S	Oslo	MJ	25,891	55.9	85,727	25.6	245	238

NOTES: All currency is given as U.S. dollars in thousands. Exchange rates are given for 1987 and 1986, respectively.

Agency	City	Owner-ship	Gross income	% chg	Billings	% chg	Work force 1987	Work force 1986
ScanPartner Norge	Oslo	NA	15,292	21.7	57,592	29.0	212	202
Scaneco-Young & Rubicam	Oslo	MJ	9,711	69.1	64,780	69.1	125	114
Lintas:Norway	Oslo	MJ	5,685	131.7	37,922	10.2	76	76
Ogilvy & Mather	Oslo	MJ	5,546	25.3	44,430	54.7	64	65
Espeseth & Molkom	Oslo	NA	5,354	NA	21,416	NA	NA	NA
Lund & Lommer	Oslo	NA	3,932	NA	15,727	NA	NA	NA
DMB&B Oslo	Oslo	MJ	3,791	(16.2)	18,203	(9.6)	63	75
Jenssen & Borkenhagen	Oslo	NA	3,404	20.9	24,901	33.3	33	23
Nordskar & Thorkildsen	Oslo	NA	3,241	78.8	10,635	111.7	17	17
Reklamens Hus/McCann	Oslo	MJ	2,749	13.2	18,335	13.2	41	35
Forenede Annonsebyraer	Oslo	NA	2,636	NA	10,544	NA	NA	NA
Viking Reklamebyra	Oslo	NA	2,460	NA	9,840	NA	NA	NA
Pramm & Co.	Oslo	NA	2,424	NA	9,696	NA	NA	NA
Skarrud & Rabben Gruppen	Oslo	NA	2,369	NA	9,475	NA	NA	NA
ByraGruppen	Oslo	NA	2,365	NA	9,293	NA	NA	NA
Anderson & Lembke A/S	Oslo	MJ	2,196	39.3	13,184	39.3	NA	23
Foote, Cone & Belding	Oslo	MJ	2,125	30.1	14,174	30.1	23	22
Engelsrud Reklamebyra	Oslo	NA	1,928	NA	7,711	NA	NA	NA
Oslo Reklamebyra	Oslo	NA	1,904	NA	7,616	NA	NA	NA
Lunde Marketing	Oslo	NA	1,901	NA	7,604	NA	NA	NA
Dramsrud & Werner	Oslo	NA	1,787	NA	7,148	NA	NA	NA
Bennett Reklame	Oslo	NA	1,752	NA	7,010	NA	NA	NA
Schjaerven/J. Walter Thompson	Oslo	NE	1,708	29.1	11,392	29.1	21	22
Corneliussen & Odegaard	Oslo	NA	1,592	NA	6,367	NA	NA	NA
MK Bergen Reklamebyra	Bergen	NA	1,569	NA	6,276	NA	NA	NA
Jensen-Grey A/S	Oslo	MN	1,416	2.2	4,869	(47.3)	20	30
Bj. Kverneland	Oslo	NA	1,156	86.4	8,103	58.8	16	14
Jan T. Kallevig	Oslo	NA	326	(20.3)	2,171	(20.3)	7	7
Saatchi & Saatchi Advertising	Oslo	MJ	109	NA	217	NA	5	NA
PAKISTAN							***Exchange rates: 0.058500/0.061100 rupee***	
R:Lintas	Karachi	NE	1,166	16.5	7,781	16.6	80	69
Asiatic Advertising	Karachi	NA	562	27.7	3,805	29.8	102	95
Prestige Communications	Karachi	NA	395	38.1	2,633	38.0	50	40
PANAMA							***Exchange rates: 1.000000/1.000000 U.S. dollars***	
Campagnani, Aleman Publicidad	Panama City	NE	1,455	15.9	9,700	83.0	54	47
McCann-Erickson de Panama	Panama City	MJ	975	0.6	6,503	0.6	42	36
APCU de Panama	Panama City	NA	274	9.6	1,832	10.0	18	16
BB&M Publicidad	Panama City	NE	NA	NA	NA	NA	NA	NA
PARAGUAY							***Exchange rates: 0.001280/0.001620 guarani***	
JWT SA	Asuncion	MJ	81	(16.1)	539	(16.1)	10	10
McCann-Erickson (Paraguay)	Asuncion	MJ	25	(8.0)	165	(8.0)	0	0
PERU							***Exchange rates: 0.066300/0.071000 inti***	
J. Walter Thompson Peruana	Lima	MJ	2,488	87.2	16,592	87.2	90	89
McCann-Erickson (Peru)	Lima	MJ	1,635	50.4	10,908	50.4	60	69
Publicistas Asociados	Lima	NE	1,551	174.7	8,619	182.3	46	48
CNP & Grey	Lima	ND	833	40.1	5,556	40.2	70	74
Perdomo-Ted Bates/Publicidad	Lima	MN	90	(31.7)	600	(31.7)	12	9
PHILIPPINES							***Exchange rates: 0.049100/0.051100 peso***	
Basic/Foote, Cone & Belding	Manila	MN	3,017	191.8	20,125	191.8	164	154
McCann-Erickson (Philippines)	Manila	MJ	2,432	26.5	16,221	26.5	176	162
J. Walter Thompson Co.	Manila	MJ	2,237	(9.0)	14,924	(9.0)	195	208
Ace/Saatchi & Saatchi	Manila	MJ	1,727	13.9	11,518	12.0	146	144
Advertising & Marketing Associates	Manila	NE	1,502	(0.3)	10,263	(0.2)	191	188
Philippine Advertising Counselors	Manila	NE	1,478	16.2	9,869	16.1	120	99
Hemisphere-Leo Burnett Inc.	Manila	MJ	1,188	18.5	7,920	31.9	109	92
SSC&B:Lintas Manila	Manila	MN	1,138	22.9	7,594	22.2	84	80
Alcantara DYR	Manila	NA	973	NA	NA	NA	118	NA
A-J/Planners/BJK&E	Manila	NE	528	2.6	1,297	7.9	34	28
Admakers	Quezon City	NA	294	0.7	1,958	0.7	48	47
Aspac & Grey	Manila	MN	191	(15.8)	1,277	(15.8)	40	38
PORTUGAL							***Exchange rates: 0.006980/0.006683 escudo***	
McCann-Erickson/Hora Publicidade	Lisbon	MJ	4,414	61.3	29,443	61.3	105	90
Lintas:Portugal	Lisbon	MJ	3,609	78.5	24,060	80.0	76	61
Ciesa NCK	Lisbon	MJ	2,955	38.9	19,712	38.9	81	82
J. Walter Thompson Publicidade	Lisbon	MJ	2,685	67.2	17,899	67.2	95	75
Sistema	Lisbon	MN	2,457	122.8	12,285	67.1	NA	64
FCB Publicidade	Lisbon	MJ	2,167	48.5	14,453	48.5	45	40
Team	Lisbon	NA	1,989	65.4	13,262	65.4	80	58
Ogilvy & Mather Portugal	Lisbon	MJ	1,565	131.5	10,438	131.5	46	39
Publicis Lisboa	Lisbon	MJ	1,532	26.8	7,126	24.4	66	74
Boom & Bates	Lisbon	MN	1,354	80.9	4,679	81.4	23	21
DDB Needham & Guerreiro	Lisbon	MJ	1,228	NA	8,188	NA	30	NA
Antena/BBDO	Lisbon	NE	839	48.4	6,011	49.1	37	32
Latina	Lisbon	NA	628	59.3	2,862	47.7	30	30
Timing Alliance	Lisbon	MJ	306	70.1	2,038	70.4	NA	NA

NOTES: All currency is given as U.S. dollars in thousands. Exchange rates are given for 1987 and 1986, respectively.

Agency	City	Owner-ship	Gross income	% chg	Billings	% chg	Work force 1987	Work force 1986
Sensus Publicidade e Marketing	Porto	NE	170	NA	1,372	NA	23	NA
PUERTO RICO							***Exchange rates: 1.000000/1.000000 U.S. dollar***	
Badillo/Saatchi & Saatchi	San Juan	MJ	10,750	4.0	71,700	3.9	196	185
Marti, Flores, Prieto & Wachtel	San Juan	MN	6,039	29.3	39,013	25.3	92	86
Young & Rubicam Puerto Rico	San Juan	MJ	5,259	2.6	35,078	2.6	99	82
West Indies & Grey	San Juan	ND	4,000	NA	26,680	NA	88	NA
FCB Inc.	Isla Verde	MJ	2,576	(12.6)	17,182	(12.6)	57	61
McCann-Erickson (Puerto Rico)	San Juan	MJ	2,499	(4.4)	16,668	(4.4)	47	55
Leo Burnett Inc.	San Juan	MJ	2,491	23.6	16,607	23.6	50	43
BBDO Puerto Rico	Hato Rey	MJ	2,414	19.8	16,100	20.1	46	38
CPVE/BJK&E	Santurce	MJ	378	(49.6)	1,600	(68.0)	9	18
SAUDI ARABIA							***Exchange rates: 0.266700/0.271300 riyal***	
Targets Advertising	Jeddah	NE	923	NA	6,150	NA	19	NA
Madco Saudi Arabia	Jeddah	NA	692	12.0	3,600	2.9	9	9
D'Arcy Masius Benton & Bowles	Jeddah	MJ	22	520.1	146	525.3	1	6
SINGAPORE							***Exchange rates: 0.469600/0.463800 Singapore dollar***	
Batey Ads	Singapore	NA	3,479	5.6	25,138	4.2	78	70
Ogilvy & Mather	Singapore	MJ	2,965	22.4	19,778	22.4	109	97
McCann-Erickson (Singapore)	Singapore	MJ	2,401	26.1	16,015	26.1	77	64
Leo Burnett Ltd.	Singapore	MJ	2,110	24.6	14,067	24.6	66	55
HDM-DYR Singapore	Singapore	NA	1,689	8.9	NA	NA	41	47
J. Walter Thompson Co.	Singapore	MJ	1,589	31.8	10,600	31.8	62	47
SSC&B:Lintas SEA Singapore	Singapore	MJ	1,413	33.3	9,422	24.4	40	34
Saatchi & Saatchi Advertising	Singapore	MJ	1,244	30.7	7,748	22.0	53	40
Bozell, Jacobs, Kenyon & Eckhardt	Singapore	MJ	1,221	(17.5)	8,144	(17.5)	52	54
Adcom & Grey	Singapore	MN	1,021	(7.3)	6,812	(7.3)	40	40
Ted Bates Ltd/Singapore	Singapore	MJ	1,006	11.8	6,068	20.0	49	49
Ball Partnership	Singapore	MJ	793	(25.1)	5,289	(24.3)	35	NA
Mojo Singapore	Singapore	MJ	759	NA	5,035	NA	26	NA
BBDO Advertising	Singapore	MJ	704	17.6	4,700	17.6	23	34
Spenser, Kaslan & Friends	Singapore	NA	517	NA	3,522	NA	19	NA
Tropical Alliance	Singapore	MJ	366	NA	2,442	NA	NA	NA
D'Arcy Masius Benton & Bowles	Singapore	MJ	338	86.2	2,306	47.2	22	17
Tom Tan Associates	Singapore	NA	303	3.4	2,155	6.3	19	19
CR & Grey	Singapore	MN	272	186.0	1,813	186.0	9	2
DDB Needham	Singapore	MN	241	(22.8)	1,606	(22.9)	12	NA
Chuo Senko Advertising	Singapore	NA	121	74.2	987	85.7	NA	NA
SOUTH AFRICA							***Exchange rates: 0.481400/0.428400 rand***	
Grey Phillips	Johannesburg	MN	9,453	14.9	63,049	14.9	NA	256
Young & Rubicam South Africa	Cape Town	MJ	8,899	27.9	59,260	27.9	336	348
Ogilvy & Mather Rightford	Johannesburg/ Cape Town	MN	8,371	34.8	42,742	26.0	234	235
Lindsay Smithers-FCB	Sandton	MN	7,449	39.5	49,689	39.5	255	238
Klerck & McCormac	Johannesburg	NE	6,639	54.2	40,498	60.3	202	202
McCann-Erickson South Africa	Johannesburg	MJ	6,045	25.4	40,320	25.4	197	186
Lintas South Africa	Johannesburg	MJ	4,419	31.6	29,477	41.7	140	130
J. Walter Thompson South Africa	Johannesburg	MN	4,153	17.9	27,699	17.9	122	136
Freedman & Rossi/BBDO	Sandton	NE	2,163	26.0	14,427	26.0	72	109
Partnership in Advertising	Johannesburg	MN	1,874	15.3	12,499	15.3	48	38
IMA Ltd.	Cape Town	NA	1,468	18.6	9,181	19.5	56	59
Ogilvy & Mather Direct	Johannesburg/ Cape Town	MN	1,304	45.3	4,517	61.6	44	37
Meridian Advertising	Johannesburg	MN	748	71.7	3,809	67.6	22	20
P.N. Barrett Co.	Cape Town	NA	506	19.8	3,547	21.2	20	20
SOUTH KOREA							***Exchange rates: 0.001201/0.001131 won***	
Korea First Advertising	Seoul	NA	23,482	44.1	130,089	32.6	421	364
Oricom Inc.	Seoul	NA	15,260	(4.6)	84,779	4.8	372	362
Korad	Seoul	NE	8,885	63.9	62,711	64.4	226	158
Daehong Advertising	Seoul	NE	8,323	(11.3)	91,396	32.3	177	177
LG Ad	Seoul	NE	7,146	32.5	85,511	50.1	245	194
Union Advertising	Seoul	NE	5,763	13.0	55,847	13.0	182	173
Dong Bang Advertising	Seoul	NE	4,284	25.3	42,837	25.4	129	NA
Diamond Advertising	Seoul	NE	3,167	59.1	31,670	59.4	141	99
Nara Advertising	Seoul	NA	2,665	77.2	15,493	66.6	81	72
Samhee Advertising	Seoul	NA	2,568	19.5	25,677	19.5	89	NA
Seoul Agency	Seoul	NA	2,091	10.7	20,909	10.7	98	NA
Geoson	Seoul	NE	1,500	96.5	15,000	89.5	92	65
Handok Advertising	Seoul	NA	854	NA	5,693	NA	35	NA
SPAIN							***Exchange rates: 0.007855/0.006980 peso***	
Grupo Bates	Madrid	MJ	22,709	39.3	151,468	39.3	351	339
McCann-Erickson Group	Madrid	MJ	17,165	28.9	114,491	28.9	225	215
J. Walter Thompson SA	Madrid	MJ	16,906	30.4	112,765	30.4	186	197
Lintas:Spain	Madrid	MJ	12,888	38.5	85,961	27.9	126	117
BBDO Espana	Barcelona	MJ	12,293	58.2	101,015	60.5	123	105
TAPSA/N W Ayer	Madrid	MJ	11,929	31.0	85,836	29.4	93	93
Tandem/DDB Needham	Madrid	JV	11,077	21.1	73,845	21.5	122	94
HDM SA	Madrid/Barcelona	MJ	9,450	44.0	63,029	44.0	97	96

NOTES: All currency is given as U.S. dollars in thousands. Exchange rates are given for 1987 and 1986, respectively.

Notes to individual agency listings

GENERAL NOTES

Exchange rates. All figures in this report are historical, unless otherwise noted. Exchange rates are given in the country tables for 1987 and 1986, respectively. Although the questionnaire sent to agencies requested constant conversion of local currency to U.S. dollars using the 1987 exchange rate, ADVERTISING AGE editors decided to use historical figures rather than allow a weak dollar to unnecessarily inflate foreign agency income.

Also, the exchange rate used for Brazil was changed to 0.0255 from 0.0185 (source: Conjuntura Economica, Sao Paulo), and Hong Kong's rate was changed to 0.1282 from 0.1176.

Abbreviations for equity holdings:
MJ—majority owned, 51% to 100%
MN—minority owned, 1% to 50%
NE—no equity—affiliation or association
NA—not applicable—locally owned
JV—joint venture—50/50

Young & Rubicam does not report billings. Figures listed for Y&R throughout the charts are AA estimates.

HDM-DYR offices in Asia (Japan, Malaysia, Philippines, Singapore, Thailand and China) are in the process of changing their equity situation. Therefore, in the respective country charts, ownership is indicated as NA.

NOTES BY COUNTRY

ARGENTINA

Ortiz, Scopesi y Cia. minority owned by Ogilvy & Mather. **Lautrec Publicidad** affiliated with Saatchi & Saatchi Advertising Worldwide. **Pragma/FCB** 20% owned by Foote, Cone & Belding. **Yuste Publicidad** affiliated with Bozell, Jacobs, Kenyon & Eckhardt. **Johnson/-B&B** DMB&B holds 5% equity. **Cicero/-Ted Bates** did not submit figures.

AUSTRALIA

Young & Rubicam figures include Burson-Marsteller. **Dancer Fitzgerald Sample** part of Saatchi & Saatchi Advertising Worldwide. **Clemenger/-BBDO** 45% owned by BBDO. **DDB Needham** lists a Sydney and Melbourne office; plus, additionally, Leonardi & Curtis and Stokes King DDB Needham. **Nexus Advertising** and **Geoff Niere Advertising** part of the International Federation of Advertising Agencies. **Hertz Walpole** 48% owned by Lowe Howard-Spink & Bell. **DDB Needham Sydney** figures include data for USP Needham. **Forbes Macfie Hansen, Tarrant Haysom & Manzie** and **Thomson White & Partners** '87 gross income are AA estimates.

AUSTRIA

GGK Austria figures are for offices in Vienna and Salzburg. **Lintas Austria** 1986 figures are only for the Vienna office. 1987 data includes Salzburg. **Werbeagentur Wirz** 5% owned by agency group Wirz Holding, Zurich. **Die Sieber** affiliated with Saatchi & Saatchi Advertising Worldwide. **HDM Dorland** 40% owned by HDM International. **Publicitas** affiliated with Bozell, Jacobs, Kenyon & Eckhardt. **Marketing Studio/FCB** 32% owned by Foote, Cone & Belding. **Campbell Ewald** majority owned by Lowe Howard-Spink & Bell. **Gould Cargill** majority owned by Grey Advertising. **Grey Advertising** includes figures for ARC. **Ogilvy & Mather** includes figures for O&M Direct and O&M Public Relations.

BAHRAIN

Fortune Promoseven Network offices in Saudi Arabia, Kuwait, Dubai, Egypt, Lebanon, U.K. and France. **Radius Advertising** affiliated with Leo Burnett Co.

BELGIUM

Ted Bates includes figures for both years for Coerten S.A., a fully owned subsidiary. **Young & Rubicam** includes Wunderman and Burson-Marsteller. **Katte Empain** 51% owned by Belier Communications, Neuilly. **McCann-Erickson Belgium** figures include McCann Direct and Universal Communication, Brussels and Wilrijk, and Universal Advertising Team, Antwerp. **HHD Ogilvy & Mather** does not supply billings. **Partner** affiliated with Saatchi & Saatchi Advertising Worldwide. **M&CW** 75% owned by Bozell, Jacobs, Kenyon & Eckhardt. **Moors Bronseiser** and **Morael & Partners** majority owned by BBDO Worldwide.

BRAZIL

Alcantara Machado, Periscinoto Comunicacoes did not supply AA with '87 figures. **Fischer, Justus/Young & Rubicam** includes Cato-Johnson and Burson-Marsteller. **Norton Publicidade** affiliated with Bozell, Jacobs, Kenyon & Eckhardt. **SGB Publicidade** affiliated with Saatchi & Saatchi Advertising Worldwide. **LS/BBDO** 48% owned by BBDO Worldwide. **Denison Propaganda**, affiliated with Backer Spielvogel Bates, did not submit figures. **Expressao** is the house agency for Brazilian airline Varig.

BRITAIN

Saatchi & Saatchi UK includes Harrison Cowley, RPG, Acme, SPA, Halls. **Young & Rubicam** includes Wunderman, Cato-Johnson, Sudler & Hennessey and Burson-Marsteller. **Grey Ltd.** includes London agency Newton & Godin, acquired in '87. **Ted Bates Holding's** dramatic increase in 1987 billings over '86 due to the agency having won the $42 million Dixon account from Dorland Advertising in '87. **Butler, Borg & LSW** and **Slaymaker Cowley White/BDG** 35% owned by Bozell, Jacobs, Kenyon & Eckhardt. **Dorland Advertising** and **KHBB** majority owned by Saatchi & Saatchi. **McCann-Erickson U.K.** includes Harrison Advertising, Advertising Ltd., Photo-Video Ltd., Intercompany Administrative & Computing Services, Universal McCann, McCann Direct, M/E Communications, M/E Royds and EPIC. **Lintas Ltd.** includes Presight, Lintas: Overseas, CM:Spectrum and Init. Media. **Allen Brady & Marsh** majority owned by Lowe Howard-Spink & Bell. **Leagas Delaney Partnership** majority owned by Abbott Mead Vickers/SMS. **Lowe Bell Communications** majority owned by Lowe Howard-Spink & Bell. **White Bull Holmes Group** part of agency group Alliance International. **Butterfield Day Devito Hockney** opened in 1987. Gross income AA estimate. **Business Advertising Europe** majority owned by Anderson & Lembke, a business-to-business advertising group. **LansdownEuro** majority owned by J. Walter Thompson Co. **Connell May & Steavenson**; **Delaney Fletcher Delaney; Still Price Court Twivy D'Souza; Geers Gross; Collett Dickenson Pearce; Gold Greenless Trott; Yellowhammer; Bartle Bogle Hegarty; Cogent Elliott; Chetwynd Haddons; Lonsdale; ARC**; and **Valin Pollen** 1987 figures are AA estimates.

CANADA

Young & Rubicam includes Wunderman and Burson-Marsteller. **Ted Bates** does not include data for Straiton-Pearson. **Enterprise Advertising** majority owned by J. Walter Thompson Co. **Baker Lovick, Grant Tandy** and **PNMD** majority owned by BBDO Worldwide. **Ronalds-Reynolds** became part of the Foote, Cone & Belding network in '87. **Kelley Advertising** formerly R.T. Kelley. Joint venture with Grey Advertising. **Harrod & Mirlin** majority owned by McCann-Erickson Worldwide. **Palm Lintas Communications** 33⅓% owned by Lintas:Worldwide. **FCB/Provost** 50/50 joint venture. **Foster Advertising; Vickers & Benson; Millers Myers Bruce Dallacosta; Prism Communications; Ian Roberts; Francis, Williams & Johnson; Base Brown & Partner; Marketel/Publim**; and **Cossette Communication-Marketing** 1987 gross income figures are AA estimates. **McKim Advertising** did not submit figures.

CHILE

Azocar, Morrison, Walker 20% owned by J. Walter Thompson Co. **Publiart/BBDO** and **Hermosilla, Zegers** 40% owned by BBDO Worldwide. **Epoca/Ted Bates** did not report.

COLOMBIA

Atlas Publicidad affilated with J. Walter Thompson Co. **Torre Propaganda Sancho** non-equity affiliation with Saatchi & Saatchi Advertising Worldwide. **Publicidad Artefilme** majority owned by Foote, Cone & Belding. **Atenas/BBDO** non-equity affiliation. **Centrum Ogilvy & Mather** did not submit figures.

COSTA RICA

Alberto Garnier non-equity affiliation with BBDO Worldwide.

CYPRUS

Impact/BBDO International 44% owned by BBDO Worldwide.

DENMARK

Young & Rubicam includes Wunderman and Cato-Johnson. **Ted Bates** includes Plan Design, Partners and Norgard Mikkelsen. **Scanpartner Danmark** formerly Innovation. **Ogilvy & Mather** includes Arhus office, O&M Direct and O&M PR. **Team/BBDO Group Denmark** includes data for Team/BBDO; ProMotion; Nielsen, Mikkelsen & Duus; BBDO Business/Stig Backen; and Henriksen & Sieling/-BBDO. **Saatchi & Saatchi** opened its Copenhagen office last year.

DOMINICAN REPUBLIC

Official currency here is the Dominican Republic dollar. However, a parallel currency is the peso, with a current value of .2252 to the dollar. In the chart, only U.S. dollar figures are given, since some agencies reported data in dollars and others in pesos.

ECUADOR

Norlop Thompson 20% owned by J. Walter Thompson Co. **Andina/-BBDO** non-equity affiliation. **Veritas Publicitaria** non-equity affiliation with Ogilvy & Mather.

FINLAND

Sek Advertising, in which Grey Advertising acquired a majority stake in '88, is now called Sek & Grey. **Tehomainos-J. Walter Thompson Oy** 25% owned by JWT. **Mainostoimisto MAS Oy** formerly called Mainosrengas Oy. **Interplan Oy** non-equity affiliation with Saatchi & Saatchi Advertising Worldwide. **Avant/BBDO** and **Asanti, Konttinen ja Torkler Oy** both 20% owned by BBDO Worldwide.

FRANCE

Publicis Conseil includes BCA Publicis, Edico Publicis, Grand Angle Publicis, Publicis Mediterranee, Projectis Publicis, Publicis Soleil, de Bonneville Orlandini, Intermarco, Loeb & Associe, Orexa, Siquier Courcelle, Success Slad and Publicis Sante. **Belier** includes Belier Conseil, Belier Rive Gauche, Atelier Belier, Australie, Impact, Diva and regional agencies. Belier is part of the WCRS/-Belier Group, in which London-based WCRS Group owns 49%, Belier holds a 20% stake in WCRS and the rest is held by French parent Eurocom. **Roux, Seguela, Cayzac & Goudard** includes 18 regional offices and Racines, Chevassus Vadon, Glad, Seven and Motivente. **Polaris**, Eurocom's regional network, merged late last year with Synergie/BJK&E in a joint venture. The agency will be known as Synergie. **BDDP Group** includes nine regional agencies, Tequila, Messages, Hotshop, Mafia, Alexandre Tic, and Makalu. **Young & Rubicam** includes Wunderman, Cato-Johnson, Sudler & Hennessey and Burson-Marsteller. **Eldorado** majority-owned by Eurocom. **Ted Bates** does not supply billings figures. **Lintas:France Group** includes Initiative Media Paris, Sprint and Publi Service. **Saatchi & Saatchi Advertising** includes References, Compar, S&S Ethical, DP Industries, Doping, Club Media and S&S Direct. **McCann-Erickson France** includes Joannis Schneider and Universal Media. **CPV** minority owned by Bozell, Jacobs, Kenyon & Eckhardt. **Creative Business** majority owned by RSCG. **Lowe Lichtenberg Faucher** majority owned by Lowe Howard-Spink & Bell. **RSCG Export** covers agencies in Africa, the Middle East and the Caribbean. **Audour/Soum Scali, McCabe, Sloves**, 30% owned by SMS, did not supply figures. **Domino Ketchum**, Paris, did not submit figures.

GERMANY

Young & Rubicam includes Wunderman, Cato-Johnson, Sudler & Hennessey and Burson-Marsteller. **Team/-BBDO Group** figures cover Team/-BBDO in Duesseldorf, Hamburg, Berlin and Kronberg; Eiler & Riemel (45% equity); Imparc; and Selection. **McCann-Erickson Germany** includes Universal-Kommunikation and McCann-Erickson Intensiv. **Grey Duesseldorf** includes Market Horizons and Grey Direct. **Ted Bates** figures include data for Scholz & Friends, Hamburg. Scholz & Friends is also listed separately. **Baums, Mang und Zimmermann** 49% equity held by Foote, Cone & Belding. **Eggert Werbeagentur** 40% owned by HDM. **MSH Bozell Jacobs Werbeagentur** 35% owned by BJK&E. **Heye & Partner** (in which DDB Needham Worldwide holds minority equity); **Service Plan; Guenter Blaese; Bessere Werbung; Springer & Jacoby; Economia; Lueders; Spiess & Ermisch; Ernst & Partner; Borsch, Stengel & Partner; Wensauer & Partner; Agenta; Acon; Hakuhodo**; and **Die Werbe Euro** 1987 figures are AA estimates.

GREECE

Spot/Thompson 44% owned by J. Walter Thompson Co. **Olympic DDB Needham** 5% owned by DDB Needham. **Grafis S.A.** 26% owned by BBDO Worldwide. **Gnomi/FCB** 40% owned by Foote, Cone & Belding. **Lamda Alpha Advertising** non-equity affiliation with N W Ayer.

GUATEMALA

APCU Thompson Asociados: J. Walter Thompson Co. holds 40% equity in APCU, with offices in Panama, Costa Rica, El Salvador and Honduras. **Communica Publicidad** affiliated with Leo Burnett Co. **Publimerca** affiliated with BBDO Worldwide.

HONG KONG

Synergie Communications in '88 became part of WCRS' Ball Partnership. Formerly 35% owned by Bozell, Jacobs, Kenyon & Eckhardt. **Results (HK)** majority owned by Ogilvy & Mather. **Far East-Ketchum** minority-owned by Ketchum Advertising. **Hong Kong (FE) Advertising** part of the Far East Advertising Group.

HUNGARY

The following information from the three leading Budapest-based Hungarian agencies reached AA too late for inclusion in the country charts. **Publishing and Advertising Establishment for Tourism**: Gross income '87 $9.6 million, billings '87 $21.7 million; employees '87 420, '86 403. **Mahir**: Gross income '87 $5.5 million, '87 bill-

(Continued on Page 74)

Agency	City	Ownership	Gross income	% chg	Billings	% chg	Work force 1987	Work force 1986
URUGUAY			***Exchange rates: 0.005000/0.007200 peso***					
Corporacion/Thompson	Montevideo	NE	1,265	22.2	5,500	22.2	50	45
Impetu Organizacion Publicitaria	Montevideo	NE	720	(18.0)	3,000	(18.0)	65	64
McCann-Erickson (Uruguay)	Montevideo	MJ	313	26.7	2,090	26.7	13	14
Grey Uruguay	Montevideo	MN	293	32.5	1,952	32.5	13	14
VENEZUELA			***Exchange rates: 0.038900/0.055900 bolivar***					
Corpa	Caracas	MN	4,767	25.1	31,799	25.3	246	184
J. Walter Thompson de Venezuela	Caracas	MJ	3,740	(6.6)	24,933	(6.6)	163	153
Leo Burnett-Venezuela	Caracas	MJ	2,176	3.3	14,510	3.3	99	91
ABC-McCann Publicidad	Caracas	MJ	2,133	5.5	14,225	5.5	91	86
JMC Creatividad Orientada/Y&R	Caracas	MJ	2,003	13.0	13,356	13.0	85	80
FCB/Siboney/Uribe	Caracas	MJ	1,548	19.7	10,322	19.7	96	70
Ghersy/Quintero & Ted Bates	Caracas	MN	1,089	(11.4)	6,496	(10.6)	57	56
Vapro Publicidad	Caracas	NE	1,030	23.6	3,077	(12.6)	44	42
AW/Saatchi & Saatchi	Caracas	MJ	906	2.4	6,056	13.7	60	48
Grey Advertising de Venezuela	Caracas	MJ	480	(1.7)	3,202	(1.7)	38	41
Young & Rubicam Caracas	Caracas	MN	202	(30.0)	1,349	(30.0)	28	28
ZAMBIA			***Exchange rates: 0.060000/0.162100 kwacha***					
Young & Rubicam (Zambia)	Lusaka	MJ	172	(37.4)	1,146	(37.4)	19	18
ZIMBABWE			***Exchange rates: 0.350000/0.591900 Zimbabwe dollar***					
Barker McCormac	Harare	NE	1,612	15.0	7,348	15.3	75	75
Michael Hogg/Young & Rubicam	Harare	MN	638	(44.5)	NA	(100.0)	70	70
Lintas:Zimbabwe	Harare	MJ	370	(33.1)	2,470	(20.3)	43	38

NOTES: All currency is given as U.S. dollars in thousands. Exchange rates are given for 1987 and 1986, respectively.

Notes

(Continued from Page 73)
ings $27.6 million; employees '87, 656; '86, 702. **Hungexpo**: Gross income '87, $4 million; billings '87, $32.9 million; employees '87, 612; '86, 643.

INDIA

Hindustan Thompson Associates non-equity affiliation with J. Walter Thompson Co. **DaCunha Associates** part of the International Federation of Advertising Agencies. **Ogilvy Benson & Mather** 40% owned by Ogilvy & Mather. **Lintas India** 40% owned by Lintas:Worldwide. **Clarion Advertising** non-equity affiliation with DMB&B. **Everest Advertising** minority owned by Saatchi & Saatchi Advertising Worldwide. **R.K. Swamy Advertising** non-equity affiliation with BBDO Worldwide. **Chaitra Advertising** non-equity affiliation with Leo Burnett Co. **Contract** non-equity affiliation with J. Walter Thompson Co. **Advertising & Sales Promotion** non-equity affiliation with N W Ayer. **Trikaya Advertising** and **Rediffusion Advertising**, affiliates of Grey and Backer Spielvogel Bates, did not report figures. Also, **Jaisons Advertising Private, Sista's Private Ltd., Shilpi Advertising, National Advertising Service** and **Apex Advertising**, all in Bombay, did not report figures.

INDONESIA

Adforce-JWT, Suliato/BBDO and **P.T. Citra:Lintas Indonesia** are all non-equity affiliations. **Matari** non-equity affiliation with Bozell, Jacobs, Kenyon & Eckhardt. **DMB&B Perwanal** 45% owned by DMB&B. **Fortune** non-equity affiliation with Saatchi & Saatchi Advertising. **P.T. Bates Mulia Indonesia** did not report figures.

IRELAND

O'Kennedy-Brindley and **Hunter Advertising** non-equity affiliation with Saatchi & Saatchi. **McConnells, CDP Associates** and **Southern Advertising Group** gross income figures are AA estimates. **Wilson-Hartnell** part of Ogilvy & Mather. **Aubrey Fogarty Associates** did not report figures.

ITALY

Young & Rubicam includes Cato-Johnson, Burson-Marsteller. **MAC Group Italia** includes offices in Rome, Reggio Emilia, Bologna; also included in the figures: EURO/BTB, Comunicazione Strategica, Euro MAC-Ancona. **Belier Comunicazione** includes data for ATA Belier and CGSS. **Italia/BBDO** 40% owned by BBDO Worldwide. **SSC&B:Lintas** includes data for Centro Media. **P&T Co.** part of the International Federation of Advertising Agencies. **Pubbli Dan Wirz** 25% owned by agency group Wirz Holding, Zurich. **KIK Promotion** and **Pragma** majority owned by B Communications.

JAMAICA

Dunlop Corbin Advertising majority owned by Saatchi & Saatchi Advertising Worldwide. **Lindo, Foote, Cone & Belding** 15% owned by FCB.

JAPAN

Dentsu Inc.'s major Japanese subsidiaries are: DEN-EI Inc., Dentsu Printing Co. Ltd., AD Dentsu Tokyo Inc., Dentsu Kosan Co., Dentsu Cotec Ltd., Dentsu PR Center Ltd., Dentsu Research Ltd., Dentsu EYE Inc., Dentsu Institute for Human Studies, Dentsu Echo Inc., Information Services International-Dentsu Ltd., HDM/DYR K.K. Japan (Tokyo), HDM/DSH K.K. (Tokyo) and Dentsu Wunderman Direct Inc. **Hakuhodo:Lintas** 50/50 joint venture. **Nambokusha** 51% owned by Toyota Motor Corp. **Tokyu Agency International** 24% owned by DMB&B. **Meitsu/BJK&E** 30% owned by BJK&E. **Chuo Senko Advertising** offices in Thailand, Hong Kong, Malaysia and Singapore. **I&S Corp.**, formerly Dai-Ichi Advertising, has non-equity affiliation with Ogilvy & Mather. **Asatsu** 9.5% owned by BBDO Worldwide. **Dai-Ichi Kikaku** holds 2.44% of Omnicom, New York. **DDB Needham Sanyu DIK** 40% owned by DDB Needham Worldwide. **Daiko/FCB Impact** 50/50 joint venture. **Saatchi & Saatchi Advertising** office opened in 1987. **Cove-Ito Advertising**, with fully owned offices in Thailand and Hong Kong, holds 47% equity in Cove-Ito McLarty, Toronto.

LEBANON

H&C Leo Burnett non-equity affiliation. **Enterprise Middle East**, majority owned by Leo Burnett Co. and headquartered in Athens, does business in the Middle East.

MALAYSIA

Ogilvy & Mather, AMC Saatchi & Saatchi Advertising, Leo Burnett and **Francis Lim Zulkifli & Ayer** all minority owned. **PTM Thompson** 25% owned by J. Walter Thompson Co. **McCann-Erickson Malaysia** includes data for Mutiara. **KHK Needham** 30% owned by DDB Needham Worldwide. **Ted Bates Malaysia** 49% owned by Backer Spielvogel Bates. **A.P./FCB** 30% owned by Foote, Cone & Belding. **Bozell, Jacobs, Kenyon & Eckhardt** and **Grant Advertising**, in both of which BJK&E holds minority interest, did not report gross income or billings.

MEXICO

Publicidad Ferrer formed a joint venture last year with Davis, Johnson, Mogul & Colombatto, Los Angeles. **Arellano Ted Bates** did not submit figures. **Noble y Asociados** majority owned by DMB&B. **Bozell, Jacobs, Kenyon & Eckhardt** 49% owned by BJK&E. **Dieste, Merino/BBDO** 42% owned by BBDO Worldwide. **Iconic** non-equity affiliation with Saatchi & Saatchi Advertising Worldwide.

NETHERLANDS

PMSvW/Young & Rubicam includes PMSvW, 100% owned by Y&R. Also Wunderman, Cato Johnson and Burson-Marsteller. **ARA B.V.** majority owned by BBDO Worldwide. **Result** majority owned by DMB&B. **J. Walter Thompson Co.** includes data for JWT Deltakos. **Klein & Partners** majority owned by Paris-based Belier Communications.

NEW ZEALAND

MacKay King Advertising has non-equity affiliation with Bozell, Jacobs, Kenyon & Eckhardt. **Ted Bates New Zealand** owned 40% by Backer Spielvogel Bates. **Colenso Communications, Rialto Advertising** and **Hutcheson Knowles Marinkovich** all minority owned by BBDO Worldwide. **Mainstream/FCB** 24.5% owned by Foote, Cone & Belding.

NORWAY

Ted Bates figures include offices in Bergen, Stavanger and Trondheim, also Bates Direct Marketing, B&L Creative Service and Bates/Vestfold. **Schaerven/J. Walter Thompson** non-equity affiliation. **Bj. Kverneland** gross income for both years AA estimates. **Dramsrud & Werner, Espeseth & Molkom, Lund & Lommer, Viking Reklamebyra, Oslo Reklamebyra, Pramia & Co., Forenede Annonsebyraer, Bennett Reklame, Binders, Corneliussen & Odegaard, Engelsrud Reklamebyra, Krissly & Stengraff, MK Bergen, Pran & Torgersen** and **Lunde Marketing**, only 1987 data available. Billings AA estimates.

PAKISTAN

R:Lintas non-equity affiliation. **Prestige Communications** gross income figures for both years AA estimates.

PERU

Publicistas Asociados non-equity affiliation with BBDO Worldwide.

PHILIPPINES

AdPlanners/BJK&E non-equity affiliation. **Advertising & Marketing Associates** associated with N W Ayer. Agency also is part of Alliance International. **Philippine Advertising Counselors** non-equity affiliation with BBDO Worldwide. **Basic/FCB** 40% owned by Foote, Cone & Belding. **Aspec & Grey** minority owned.

PORTUGAL

Clesa-NCK 60% owned by Foote, Cone & Belding. **Sistema** minority owned by Saatchi & Saatchi Advertising Worldwide. **Team** gross income for both years AA estimates. **Antena/-BBDO** non-equity affiliation. **Sensus** 35% owned by Bozell, Jacobs, Kenyon & Eckhardt. **Boom & Bates** 35% owned by Backer Spielvogel Bates.

PUERTO RICO

Marti, Flores, Prieto & Wachtel 22.5% owned by J. Walter Thompson. **Young & Rubicam Puerto Rico** includes Burson-Marsteller.

SAUDI ARABIA

Targets Advertising non-equity affiliation with Leo Burnett Co.

SINGAPORE

DDB Needham 49% owned by DDB Needham Worldwide. **Adcom & Grey** and **CR & Grey** are minority owned. **Tropical Alliance** office opened in '87.

SOUTH AFRICA

Grey Philips, minority owned by Grey Advertising, includes Grey Direct, Grey Communications, Grey Rakusin, Grey Action, Grey Medical, Grey Recruitment, Grey Appointments, Grey Mann and Grey Perspectives. **Ogilvy & Mather Rightford** minority owned by O&M. **Meridian** part of Ogilvy & Mather Rightford. **J. Walter Thompson Co. South Africa** 28.2% owned by JWT. **McCann-Erickson South Africa** includes G. de Villiers & Co. **Freedman & Rossi/BBDO** non-equity affiliation. **Lindsay Smithers-FCB** and **Partnership in Advertising** both 24% owned by Foote, Cone & Belding.

SOUTH KOREA

Korea First Advertising non-equity affiliations with Backer Spielvogel Bates and Hakuhodo Inc., Tokyo. **Korad** non-equity affiliation with Ogilvy & Mather. **Daehong Advertising** associated with Saatchi & Saatchi Advertising Worldwide. **LG Ad** non-equity affiliation with BBDO Worldwide. **Dong Bang Advertising** non-equity affiliation with Leo Burnett Co. **Nara Advertising** non-equity affiliation with J. Walter Thompson Co. **Diamond Advertising** non-equity affiliation with Bozell, Jacobs, Kenyon & Eckhardt. **Oricom, Union Advertising, Diamond Advertising, Samhee Advertising, Seoul Agency, Geoson** and **Handok Advertising** gross income figures for '87 are AA estimates.

SPAIN

Grupo Bates consists of Ted Bates Espana, Delvico/Bates in Madrid/Barcelona and Grupo Alas with 17 regional offices, all majority owned. **McCann-Erickson S.A. Group** includes data for McCann-Erickson Spain and McCann-Erickson Clarin Publicidad. The latter agency recorded '87 gross income of $5.96 million and '87 billings of $39.75 million. **Grupo Barro** 30% owned by Collett Dickenson Pearce, London. **SCACS Publicidad, Dos por Dos** and **Equipo Tres** '87 billings are AA estimates. **Tandem/DDB Needham** 50/50 joint venture. **Danis-Benton & Bowles** 35% owned by DMB&B. **Young & Rubicam** includes Cato-Johnson and Burson-Marsteller.

SRI LANKA

Grant BJK&E and **Minds Lanka** 40% owned by Bozell, Jacobs, Kenyon & Eckhardt. **Thompson Lanka** 24.5% owned by J. Walter Thompson Co.

SWEDEN

Ted Bates AB includes Ted Bates City and September. **Young & Rubicam AB** includes Wunderman, Cato-Johnson and Burson-Marsteller. **Blanking** non-equity affiliation with Saatchi & Saatchi Advertising Worldwide. **Ogilvy & Mather AB** office opened February '87. **DFS Pihlstrom** 49% owned by Dorland Advertising, London. **NPP Reklambyra** gross income figures for both years are AA estimates. **Hans Brindfors, KREAB Gruppen, Hall & Cederquist, Stig Arbman, Konsultgruppen, Invent Management, Ronnberg & Co., Carlson & Broman, Reklamkonsultation** and **Reklambyran Thor** billing figures for both years are AA estimates. **Invent Management** includes Ervaco, Broberg/-Eklind, Landia, Result, Final Art and BOF. **BBI AB** is the result of a merger of Anderson & Lembke and Multicomgruppen. **Skjoldebrand & Sjogren** non-equity affiliation with Leo Burnett Co.

SWITZERLAND

Advico non-equity affiliation with Backer Spielvogel Bates. **Young & Rubicam AG** includes Burson-Marsteller. **Aebi, Suter, Gisler & Partner/-BBDO** 35% owned by BBDO Worldwide. **Klooti Advertising** minority owned by Saatchi & Saatchi Advertising Worldwide. **Kern & Kern** began operation in '87. Gross income is AA estimate. **Heinz Heimann** 5% owned by Belier Communications, Paris. **BEP** majority owned by Publicis International.

TAIWAN

Regal International gross income figures for both years are AA estimates. **Eastern Advertising** non-equity affiliation with Tokyu Agency International, Tokyo. **United McCann-Erickson** '86 figures are for United Communications before McCann took over the agency. **DDB Needham** 50/50 joint venture. Office opened in '87. **Stentor/BBDO** 30% owned by BBDO Worldwide. **Target Advertising**, formerly affiliated with Saatchi & Saatchi, is now locally owned.

THAILAND

Prakit & FCB 30% owned by Foote, Cone & Belding. **Synergie Communications** non-equity affiliation with Bozell, Jacobs, Kenyon & Eckhardt. **Thai Image** 20% owned by BBDO Worldwide. **D'Arcy Masius Benton & Bowles**, formerly Paterson & Partners, 30% owned by DMB&B. **Dietheim Advertising** non-equity affiliation with Leo Burnett Co. **DDB Needham** holds 20% equity in Far East Advertising Co., which is included in '87 figures. '86 figures are for DDB Needham only.

TRINIDAD

Corbin Advertising non-equity affiliation with Saatchi & Saatchi Advertising Worldwide. **Hernandez/FCB** 49% owned by Foote, Cone & Belding. **Kenyon & Eckhardt/Caribbean Advertising** 26% owned by Bozell, Jacobs, Kenyon & Eckhardt.

TURKEY

Guzel Sanatlar non-equity affiliation with Saatchi & Saatchi Advertising Worldwide. **Manajans/Thompson** 25% owned by J. Walter Thompson Co. **Cenajans** non-equity affiliation with Grey Advertising. **Grafika:Lintas** 49% owned by Lintas:Worldwide. Gross income and billings figures for '86 are for Grafika-Maya only, the former name of the agency. **Moran Ogilvy & Mather** 40% owned by O&M. **Yaratim/FCB** 30% owned by Foote, Cone & Belding. **Birikim** opened Nov. '86. Gross income figure for '87 are AA estimates.

URUGUAY

Corporacion/Thompson, formerly Corporacion Publicitaria, has non-equity affiliation with J. Walter Thompson Co. **Impetu Organizacion Publicitaria** non-equity affiliation with BBDO Worldwide. **Grey Uruguay** minority owned by Grey.

VENEZUELA

Corpa 19.9% owned by Ogilvy & Mather. **Ghersy/Quintero & Ted Bates** minority owned by Backer Spielvogel Bates. **Vapro Publicidad** non-equity affiliation with Bozell, Jacobs, Kenyon & Eckhardt. **Young & Rubicam Caracas** 19.9% owned by Y&R.

ZIMBABWE

Barker McCormac, non-equity affiliation with Saatchi & Saatchi Advertising Worldwide. **Michael Hogg/Young & Rubicam**, minority owned by Y&R.#

Top 10 agency holding cos.

Rank	Agency	Gross Income	Billings
1.	Saatchi & Saatchi PLC	$1.68 bill.	$11.36 bill.
2.	Interpublic Group of Cos.	992.9	6.62 bill.
3.	Omnicom Group	895.5	6.27 bill.
4.	WPP Group PLC	892.5	5.95 bill.
5.	Ogilvy Group	723.9	5.04 bill.
6.	Eurocom	420.1	2.76 bill.
7.	WCRS/Belier Group	230.2	1.63 bill.
8.	Lowe Howard-Spink & Bell PLC	183.8	1.27 bill.
9.	Alliance International	83.6	557.1
10.	Mojo MDA Group	52.5	346.0

NOTES: Dollars are in millions unless otherwise noted.
Included in agency figures are income and revenues from the following subsidiaries and affiliates:

[1] Saatchi & Saatchi PLC includes: Saatchi & Saatchi Advertising Worldwide, Backer Spielvogel Bates Worldwide, Dorland Advertising, Saatchi Direct, Kobs & Draft/-Bates Direct, McCaffrey & McCall, AC&R/DHB&Bess, Campbell-Mithun, William Esty Co., Rumrill-Hoyt, Klemtner, Conill, Cochrane Chase, Livingston & Co., KHBB and Hall/Harrison Cowley.

[2] Interpublic Group of Companies includes: Dailey & Associates, Lintas:Worldwide, Lowe Marschalk (70% owned by Interpublic, 30% by Lowe Howard-Spink & Bell, London), McCann-Erickson Worldwide.

[3] Omnicom Group includes: BBDO Worldwide, DDB Needham Worldwide and Diversified Agency Services.

[4] WPP Group PLC includes: J. Walter Thompson Co., Lord, Geller, Federico & Einstein, Hill & Knowlton, MRB Group.

[5] Ogilvy Group includes: Ogilvy & Mather Worldwide, Scali, McCabe, Sloves Group, Independent Associate Agencies (including Cole & Weber), Research International, SAGE Worldwide.

[6] Eurocom includes: 33 1/3% of HDM, 51% of WCRS/Belier, Polaris (merged in '88 with Synergie/BJK&E), GBSA, Univas France, Tonic/ECOM (Italy), Groupe Bernard Julhiet, Eldorado, Colorado, Havas Contact, O.P. (France), Eurofl, Furs Loisirs, Innocom, Image & Enterprises, Groupe Omnium, O.P.F. and offices in Italy, Belgium, Holland and Switzerland.

[7] WCRS/Belier Group includes: WCRS Mathews Marcantonio, FCO, the Ball Partnership, Della Femina, Travisano & Partners, HBM/Creamer, Heller Breene, R.A. Becker, Creamer Dickson Basford, Cohn & Wells and 49% of Belier, France.

[8] Lowe Howard-Spink & Bell PLC includes: Lowe International with offices in Australia, Austria, Belgium, Canada, France, Germany, Italy, Netherlands, U.K. and 30% of Lowe Marschalk in the U.S., Allen Brady & Marsh, Laurence Charles Free & Lawson and Lowe Bell Communications.

[9] Alliance International includes: offices in Belgium, France, Ireland, Italy, Netherlands, Portugal, Singapore, Spain, U.K. and the U.S.

[10] Mojo MDA Group includes: Melbourne, Sydney, Brisbane, Perth, Mattingly, MDAM Services, Courtney Searle Mattingly, MDA Recruitment, Chandler Hambleton Delbridge & Otton, Foster Nunn Loveder, Regent MDA Tasmania, William Roberts, Joint Venture, Mojo Hong Kong, Mojo Singapore, Mojo U.S., Mojo London and Mojo Auckland.

Compiled by Ilse Cermak

Chi-town bound

Bowen move portends JWT changes

By GARY LEVIN

NEW YORK—Stephen Bowen Jr.'s relocation to J. Walter Thompson USA's Chicago office is the first of several personnel changes expected at the WPP Group unit. But JWT USA Chairman-CEO James Patterson said he's in a hiring, not a firing, frame of mind.

Mr. Bowen, the 44-year-old president of JWT USA, will move to Chicago, as expected, while keeping his current title (AA, May 2).

Mr. Patterson, the JWT USA chairman who added the ceo title last month, said he'll make unspecified changes—but no major upheavals—in responsibilities of other top JWT staffers. He doesn't expect to make any such changes until next month, at the earliest.

"There will be [changes] as we see ways we can strengthen the operation," Mr. Patterson said. "Moving assignments around a little bit is a possibility, and I'm always open to the possibility to bring in people from outside where they can make a contribution."

Among those executives who could get additional assignments are Donald Sullivan, former exec VP-general manager of JWT's Chicago office, whose current duties as vice chairman include new business; and James Heekin, exec VP-general manager in New York.

S. Bowen

But Mr. Patterson said he's "not interested in deleting" positions.

Mr. Bowen earlier denied any plans to relocate from New York, saying he merely was spending more time than usual in Chicago to hire senior account management staffers. He didn't return phone calls last week seeking comment on his planned move.

"On an overall level, we feel that Steve's move . . . will help us to serve our clients better, because we do have an awful lot of important clients, including multinational companies, who aren't in New York," Mr. Patterson said.

As Chicago-based president of the U.S. agency, Mr. Bowen won't take up the duties of Alan Webb, exec VP-general manager of JWT's Chicago office. Mr. Bowen will become the most senior JWT executive there and is expected to spend more time planning strategy with clients.

Mr. Patterson said Mr. Bowen didn't resist the move, despite rumors —later denied—that the executive would resign rather than be forcibly relocated. "It's always tough to uproot, but that was the extent of it," Mr. Patterson said. "Steve's enough of a team player to do it."

He said the Chicago office has undergone turmoil due to several major account losses and the presence of three general managers in as many years. But he said none of JWT Chicago's clients—which include Kraft, Miller Brewing Co. and Quaker Oats Co.—requested Mr. Bowen's move there.#

Agency profits post big gains for quarter

By GARY LEVIN

NEW YORK—Several publicly held ad agencies reported healthy gains in first-quarter earnings, prompted partly by the continued growth of international revenues.

Earnings reports differed little from analysts' estimates, but encouraging signs of improvement surfaced domestically after what many termed a disappointing 1987.

Although the first quarter is traditionally the weakest of the year for agencies, indications of a banner year haven't surfaced even though domestic agency revenues are up.

"I don't really see any big sign that Olympics and election year have had a significant effect," said James Dougherty, analyst at County Securities. "And I don't think it's going to if we haven't seen it by now."

Among earnings results reported last week, Omnicom Group posted net income of $7.6 million, a 21% gain over the same period a year ago.

It had commission and fee revenues of $205 million for the three months ended March 31, a 16% gain. Domestic revenues were up 13%, but international revenues jumped 22%, which the company attributed to favorable currency exchange rates and 1987 acquisitions.

Ogilvy Group's net income rose 143.7% to $3.5 million, reflecting a "weak" 1987 rather than an extraordinary 1988 thus far.

Its revenues climbed 17.6% in the first quarter to $190 million. Again, foreign growth of 16.7% outpaced domestic gains of 9.3%.

Ogilvy & Mather Worldwide's revenues were up 16.4% to $137.3 million, while those at Scali, McCabe, Sloves grew 22.9% to $22 million.

At Grey Advertising, net income rose 41% to $2 million, on commission and fee revenues of $79.6 million, a 21.5% gain. Grey cautioned that the first quarter's rate of gain "far exceeds what we anticipate for the entire year."

Interpublic Group of Cos. posted net income of $6.7 million, a 21.4% gain, on revenues of $242.8 million, up 19.9% (AA, May 2). Earnings increases were attributed to strong international operations, while both U.S. and foreign revenue growth were strong, the company said.

International gains have come from "reasonably strong" overseas economies and the continued, gradual deregulation of European broadcasting industries, which have created more advertising opportunities, Mr. Dougherty said. Currency rates, while still a factor, are less significant than in 1987, he added.

Foote, Cone & Belding Communications, Chicago, will release its first-quarter earnings early this week. Six-month results from Saatchi & Saatchi Co., London, are expected later this month.#

JWT rep

(Continued from Page 3)

fell to third for the first time in marketing, tied with Leo Burnett Co. and Ketchum Advertising. O&M was first (named by 3.3% of the respondents) and Bozell, Jacobs, Kenyon & Eckhardt second (2.7%).

JWT has posted similar dips in other attributes. In research, for example, its average score through the second quarter of last year was 7.1%, but its average score in the two subsequent surveys was 4.6%.

The agency's recent scores are also lower than its earlier scores in the four other attributes measured: account execs, creativity, media and top management.

Agency Watch is conducted for AD AGE by SRI Research Center. The research company questions by telephone a random sample of 300 ad directors of companies based in the 20 largest markets and having annual revenue of at least $25 million.

Though more people are questioned in the bigger markets like New York than in smaller markets, Agency Watch is designed as more of a national "grass-roots" survey than one focusing on the biggest advertisers in the biggest markets.

The survey has a maximum sampling error of 5.7 percentage points.

JWT and O&M have ranked either first or second in best-agency polling since Agency Watch began in 1984. O&M was again second in the latest poll, but with its lowest score yet, 5.3%. Burnett was third, named by 4.7% of the respondents.

By market, JWT was strongest in Los Angeles (named best agency by 22% of respondents there) and Atlanta (18%). Young & Rubicam topped the polling in New York, with a score of 13%, vs. 10% each for JWT and O&M.

Burnett was tops in its home city of Chicago (13%) and Minneapolis-St. Paul (12%). BJK&E was named best most often in Dallas-Fort Worth (15%), while Foote, Cone & Belding Communications received the most mentions in San Francisco (20%).

The increased disaffection and uncertainty seen among clients in the third quarter of 1987 also shows up in the latest survey. Only 59%—an Agency Watch low—agreed that ad agencies keep the client first in their day-to-day operations, while 32% disagreed. In the third quarter last year, 67% agreed and 28% disagreed.

As in the third quarter last year, an unusually high number (41%) of ad directors said they didn't know which agency was the most creative or had the best account execs (48%).

For the fourth straight survey period, Hal Riney & Partners was the hottest agency. It was named that by 5% of ad directors in the first quarter. Chiat/Day was second with 4.2%.#

For further information, contact SRI Research Center, 301 S. 68th St., Lincoln, Neb. 68510. Phone: (402) 489-9000.

For the Record

NEW YORK STATE LOTTERY named D'Arcy Masius Benton & Bowles, DDB Needham Worldwide and incumbent McCaffrey & McCall, all New York, as finalists for its $17 million account.

INTERNATIONAL ADVERTISING ASSOCIATION and ADVERTISING AGE chose Alison Farmery, sales executive at French Publishing Group, London, and David Kinsella, assistant marketing manager, Australian National Maritime Museum, Sydney, as winners of the IAA/AD AGE essay contest, themed "Advertising: The next 50 years," Mrs. G.D. Crain Jr. announced last week. Also, Helmut Sihler, president-ceo of Henkel KGaA, Duesseldorf, was given the IAA Award for "distinguished services in the field of international advertising and marketing," while the IAA's Lebanon chapter won the Golden Tulip Award for greatest contribution to the IAA in the past year.

PEOPLE METERS' DEBUT in Canada has been delayed and possibly canceled. The joint venture between A.C. Nielsen Co. of Canada and a group of advertisers, agencies and broadcasters failed to raise the broadcasters' 66% share of the $5.7 million needed by April 30. The Canadian Broadcasting Corp. had signed up for the service.

KRAFT is selling its Duracell unit for $1.8 million in cash to Duracell Holdings, a new, privately owned company formed by Duracell management and Kohlberg Kravis Roberts. Ogilvy & Mather, New York, handles.

AN AUSTRIAN POLITICAL GROUP is using a magazine campaign to try to gain support to force the resignation of President Kurt Waldheim. The Republican Club New Austria placed five ads in February and March in the newsweekly *PROFIL*. More ads are planned for June. The ads were created by *PROFIL's* designers. At issue is President Waldheim's role in Nazi war crimes.

MAGAZINE AD REVENUES for March totaled $483.6 million, up 3.6% from one year earlier, the Publishers Information Bureau reported. Ad pages for the month rose 1.4% to 14,407. For the first quarter, revenues hit a record $1.3 billion, up 11.3%, while ad pages increased 4%.

RJR NABISCO will delay test-marketing of its "smokeless" cigarette until the last quarter of 1988, the company said at its annual meeting in Atlanta last week. The company said the delay is unrelated to anti-smoking groups' request that the Food & Drug Administration regulate the new cigarette as a drug. Young & Rubicam, New York, handles.

XEROX CORP. last week announced plans to sell its first major consumer product, a personal copier. The company declined to discuss ad plans. Backer Spielvogel Bates, New York, handles its copier products.

UNITED AIRLINES will ban smoking on all its flights of 1,000 miles or less. United doesn't plan to advertise the change. Leo Burnett USA, Chicago, is agency of record.

RETAIL SALES took a turn for the worse in April after a relatively healthy March Easter buying season. Sears Merchandise Group was among the few gainers, reporting sales of $2.3 billion for the four weeks ended April 30, up 4.8% from the same time a year ago. K Mart Corp. was up 2.5% to $2 billion. On the down side, J.C. Penney Co. reported a drop of 0.4% to $933 million; May Department Stores Co., down 4.4% to $724.7 million; and F.W. Woolworth Co., down 1.1% to $547 million.

PEPSICO will be the first paid Western advertiser on Moscow's Channel 1. One 60-second TV spot will appear each night during the broadcast of the five-part series, "Pozner in America," which starts on May 18. BBDO Worldwide, New York, handles. Separately, **McDonald's Restaurants of Canada** signed an agreement to open 20 restaurants in Moscow in 1989. No advertising is planned.

3M ADVERTISING SERVICES GROUP, St. Paul, Minn., bought the Pattis Group, Chicago, the world's largest advertising sales company in magazine publishing.

AMOCO CORP. today breaks two TV commercials in spot markets for Amoco Silver Lead-Free gasoline, featuring the Lone Ranger. Actor Clayton Moore appears in opening and closing sequences. D'Arcy Masius Benton & Bowles, Chicago, handles.

CHRYSLER MOTORS last week broke a national, 30-second TV spot introducing the compact Medallion under the Eagle nameplate. William Esty Co., Southfield, Mich., handles. Separately, a majority of Chrysler's Dodge dealer ad groups nationwide are airing nine TV spots that parody music and themes of competitors' commercials. BBDO Worldwide handles.

COCA-COLA CO. signed a letter of intent with Allied Breweries Nederland BV and Bottello BV, both Amsterdam, to form a joint venture called Nederlandese Coca-Cola Bottelmaatschappij to produce and distribute soft drinks in the Netherlands.

NEW CAMPAIGNS: **Rax Restaurants** this week begins a spot TV campaign for new sandwich and salad additions to its lunch and dinner bars. Smith Burke & Azzam, Baltimore, handles. . . . **S.C. Johnson & Son** last week broke its first campaign for 9-1-1, a line of five first-aid sprays and creams in test in Los Angeles. Grant/Jacoby, Chicago, handles. . . . **North American Watch Corp.** last week began a spot TV campaign for its Concord watch line in five markets. Ogilvy & Mather, New York, handles.

ACCOUNT ACTIVITY: **Softsoap Enterprises**, Chaska, Minn., named Lacey LaMaster Nelson Farmer, Minneapolis, and Miller Meester Advertising, Bloomington, Minn., as finalists for a $1 million-plus project assignment. . . . **National Consumer Information Services**, San Francisco, to **Kirshenbaum & Bond**, New York, as first agency for its $2.5 million information-by-phone account. Also to Kirshenbaum: **Penta Hotels North America**, from James Parry Inc., for its $1 million account. . . . **Hertz Corp.**, Park Ridge, N.J., to **HDM**, New York, from Young & Rubicam for its $2 million-plus car sales account. . . . **Silver International**, New York, to **Margeotes/Fertitta & Weiss** as first agency for its $1 million account.

WORTH NOTING: **People** will publish a special issue May 16 on Princess Diana, with a single sponsor, Noxell Corp. Noxell's agency is Lintas:New York. . . . **Marriott Corp.** this month begins testing Allie's, a family-style restaurant. Earle Palmer Brown Cos., Bethesda, Md., handles.

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4

Probing the brain of Dick Lord. —Page 44

Those hip days of yore: 1968. —Page 54

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NEWSPAPER

May 16, 1988

Advertising Age

Crain's International Newspaper of Marketing. In Two Sections. Section 1.

Photo by James Pisko

Brainstorm on Saturn

Thomas Shaver (l.), director of marketing services for Saturn Corp., and Bruce MacDonald, VP-director of corporate communications, arrive at Hal Riney & Partners, San Francisco, for a three-hour presentation of strategic positioning for Saturn's import-fighting car. The agency offered a breakfast of smoked salmon, eggs Florentine and fresh fruit, followed by a brainstorming session. Riney is a finalist in the $80 million account review, along with N W Ayer, New York, and Hill, Holliday, Connors, Cosmopulos, Boston. A decision is expected later this month *(see related story on Page 91).*

'Willow' stirs promo frenzy

Marketers rush film tie-ins

By KATE FITZGERALD and JULIE LIESSE ERICKSON

More than $50 million in marketing tie-ins is riding on George Lucas' new fantasy film "Willow," which opens May 20.

Quaker Oats Co. alone committed $26 million in promotional programs for "Willow," a film about a race of little people, directed by Ron Howard.

Quaker and other marketers, including General Foods, Hunt-Wesson, Kraft, Wendy's International, Tonka toys, Parker Bros. and Random House, are betting "Willow" will approach the success of Mr. Lucas' "Star Wars" and "Raiders of the Lost Ark" instead of duplicating the failure of "Howard the Duck."

Distributor MGM/UA Communications Co.'s media advertising budget for the film is expected to exceed $6 million, handled by Wells, Rich, Greene, Los Angeles. Lucasfilm Ltd. is promising the licensees $20 million in advertising and promotional support from its own in-house operation.

Among the marketing tie-ins, starting as early as next week:

- Quaker is staking most of its summer promotional clout on the magic of "Willow." Its multibrand promotion isn't only unusually large for Quaker but also unusual in its corporate theme.

Although the biggest media budget ties "Willow" into children's cereals such as Cap'n Crunch and Oh!s, Quaker is extending the promotion to adult brands, including Aunt Jemima pancake mix, Rice-A-Roni side dishes and Quaker 100% Natural cereal.

Quaker kicks off the summertime promotion with a June 12 free standing insert including coupons for free milk and a "Willow" spoon-and-dish premium.

A second FSI, on July 10, will offer $6 in coupons plus other "Willow" premiums for

(Continued on Page 91)

Last Minute News

McSpadden leaving Saatchi

NEW YORK—Saatchi & Saatchi DFS President-Chief Operating Officer Peter McSpadden is expected to leave the agency in the next few months. A reorganization is likely, with some of Mr. McSpadden's duties going to Gary Susnajara and Edward Wax, Saatchi & Saatchi DFS Compton chairman/co-ceo and president/co-ceo, respectively. Saatchi executives couldn't be reached for comment.

Sears tries out new slogan

CHICAGO—Sears is testing "Your money's worth and a whole lot more" as a possible replacement for its 5-year-old ad slogan, "There's more for your life at Sears," *Crain's Chicago Business* reports. Ogilvy & Mather is Sears' national agency.

Pepsi Apparel in trouble

NEW YORK—VF Corp. is considering terminating its license to market Pepsi Apparel because of disappointing sales. VF split with BBDO Worldwide, the Pepsi Apparel agency, late last year and hasn't named a successor. Observers say the brand lacks fashion appeal and that the heyday of licensing products as personalities, at least for clothes, may be over.

Long John pulls media from FCB

LEXINGTON, KY.—Jerrico has pulled the $30 million broadcast media-buying assignment for its Long John Silver's Seafood Shoppes from Foote, Cone & Belding,

(Continued on Page 8)

Chris Whittle: media baron for the 1990s

By PATRICK REILLY

KNOXVILLE, TENN.—Christopher Whittle has a flair for innovative publishing that causes nightmares for New York magazine moguls, and it's only going to get worse.

That's because the 41-year-old Mr. Whittle aspires to be his generation's dominant publisher, and he's more than a little ways there.

Whittle Communications could be the most active magazine publishing company going. It has about 40 media properties up and running, including magazines, newsletters, videos, wall media (magazines in poster format) and even a syndicated radio program.

It launched 13 properties in 1987 and four so far in 1988. And there are close to 20 development teams working on properties, most of which are set to make their debut in the next 18 months.

"No one today is as successful at launching magazines as we are," Mr. Whittle said. "The mass media no longer deliver the impact or the audience reach for their advertisers the way they once did. With new approaches and new technologies, we found ways to directly target audiences."

Mr. Whittle also has found top-flight talent to help him get

(Continued on Page 90)

Photo by Jack Rose

Chris Whittle, with plans for his new corporate digs.

Agency	City	Owner-ship	Gross income	% chg	Billings	% chg	Work force 1987	Work force 1986
Danis-Benton & Bowles	Barcelona/Madrid	MJ	8,570	63.3	59,737	63.6	115	104
Saatchi & Saatchi/RCP	Madrid/Barcelona	MJ	8,358	24.3	53,972	16.3	81	60
CID Publicidad	Madrid	NA	7,737	28.0	51,607	29.0	83	96
Contrapunto SA	Madrid	NA	7,659	143.8	51,058	143.8	74	50
Bozell Ogilvy & Mather	Barcelona/Madrid	MJ	7,633	40.0	50,912	40.0	112	103
Aege	Madrid	NA	6,873	42.2	41,474	46.2	65	60
Young & Rubicam Espana	Madrid	MJ	6,488	63.2	43,277	63.2	104	94
MMLB SA	Barcelona	NA	4,792	20.4	34,562	30.3	NA	34
Grupo Barro	Madrid	MN	4,650	44.8	25,136	44.0	45	31
Ricardo Perez Asociados	Madrid	NA	4,360	45.2	29,064	43.6	27	23
FCB/Spain	Madrid	MJ	4,320	27.1	28,816	27.1	64	63
Leo Burnett SA	Madrid	MJ	4,030	20.6	26,869	20.6	53	51
B.C.K.Alliance	Barcelona/Madrid	MJ	4,014	36.9	26,707	36.7	NA	NA
3CACS Publicidad	Barcelona	NA	2,671	64.9	14,508	65.0	24	23
Equipo 3	Madrid	MJ	2,474	136.3	18,145	136.3	23	16
Slogan SA	Barcelona	NA	2,435	63.8	15,828	62.0	34	32
Grey Barcelona	Barcelona	MJ	2,396	56.7	15,977	56.8	32	26
Ogilvy & Mather Direct	Barcelona	MJ	2,349	87.9	15,658	87.9	40	23
Dos por Dos	Madrid	NA	2,254	89.6	17,202	89.6	28	24
Grey Espana	Madrid	MJ	2,122	31.0	14,147	31.0	35	34
Publicis	Madrid/Barcelona	MJ	1,811	3.6	8,483	(33.1)	27	29
MMLB/Opcion	Madrid	NA	1,681	NA	11,311	NA	14	NA
TBWA Espana	Madrid/Barcelona	MJ	1,453	27.9	9,819	28.5	20	18
RSCG y Asociados	Madrid	MJ	1,398	43.1	10,329	60.2	18	19
GGK	Madrid/Barcelona	MJ	1,282	25.2	8,669	23.9	29	27
BJK&E de Espana	Madrid	MJ	376	168.0	1,966	87.2	8	8
SRI LANKA			***Exchange rates: 0.035000/0.038400 rupee***					
Grant, BJK&E	Colombo	MN	882	9.8	2,450	16.0	111	86
Thompson Lanka	Colombo	MN	430	(20.1)	2,865	(20.1)	84	75
Minds Lanka	Colombo	MN	81	4.8	350	1.3	27	24
SWEDEN			***Exchange rates: 0.154000/0.138100 kroner***					
Hans Brindfors	Stockholm	NA	13,814	56.8	92,097	56.7	116	80
KREAB Gruppen	Stockholm	NA	12,767	40.7	85,115	40.6	163	140
Ted Bates AB	Stockholm	MJ	11,336	19.2	80,895	14.0	143	142
Invent Management	Stockholm	NA	11,103	NA	74,026	NA	149	NA
Grey Svenska	Stockholm	MJ	11,023	27.2	73,523	27.2	142	146
ScanPartner Sverige	Gothenburg	NA	10,040	26.2	43,245	33.4	140	151
Young & Rubicam	Stockholm	MJ	6,810	27.0	45,446	27.0	87	83
Konsultgruppen	Stockholm	NA	6,514	(7.5)	43,430	(7.6)	122	145
Hall & Caderquist	Stockholm	NA	5,898	47.3	39,323	47.2	56	56
McCann-Erickson Sweden	Stockholm	MJ	5,757	23.7	38,400	23.7	74	71
Svenska Intermarco-Farner	Stockholm	MJ	5,497	29.2	36,667	29.2	73	61
BBI AB	Stockholm	NA	5,082	23.8	NA	NA	67	NA
Falk & Pihl/DDB Needham	Stockholm	MJ	4,004	NA	14,630	NA	23	NA
HLR/BBDO	Stockholm	MJ	3,734	17.7	24,858	13.4	40	40
Ronnberg & Co.	Stockholm	NA	3,650	90.7	24,333	90.7	16	NA
Reklamkonsultation	Gothenburg	NA	3,634	23.6	24,231	23.6	54	NA
Lintas:Sweden	Stockholm	MJ	3,496	21.6	23,320	39.3	47	43
Blanking	Malmo	NE	3,494	15.0	24,775	15.0	40	55
Blomquist	Stockholm	NA	3,291	48.0	22,266	16.2	40	40
D'Arcy Masius Benton & Bowles	Stockholm	MJ	2,656	19.1	28,228	12.4	41	40
Carlsson & Broman	Stockholm	NA	2,618	26.0	17,454	26.0	27	NA
Skjoldebrand & Sjogren	Stockholm	NE	2,596	17.5	13,182	26.8	28	23
Welinder AB	Stockholm	NA	2,310	33.8	16,940	29.8	23	23
Stig Arbman	Stockholm	NA	2,248	(25.7)	14,990	(25.7)	44	46
Ogilvy & Mather AB	Stockholm	MJ	2,158	NA	14,396	NA	31	NA
Ehrenstrahle/BBDO Business Comm.	Stockholm	MJ	1,977	NA	13,192	NA	NA	NA
J. Walter Thompson Co. AB	Stockholm	MJ	1,957	11.3	13,051	11.3	19	26
FCB/Sweden	Stockholm	MJ	1,911	16.0	12,743	16.0	31	30
Stromgren & Malmros Alliance	Stockholm	MJ	1,620	40.0	10,800	39.9	NA	NA
RSCG Hawi	Stockholm	MJ	1,109	33.8	7,207	33.8	14	12
DFS Pihlstrom AB	Stockholm	MN	976	6.1	1,488	(16.4)	13	13
Reklambyran Thor	Stockholm	NA	493	37.2	3,307	38.1	7	5
NPP Reklamebyra	Oerebro	NA	251	(10.5)	1,677	(10.5)	15	12
SWITZERLAND			***Exchange rates: 0.648600/0.537100 franc***					
Aebi, Suter, Gisler & Partner/BBDO	Zurich	MN	11,892	25.1	79,319	25.1	122	127
GGK	Basel/Zurich	MJ	8,999	42.2	60,002	39.1	84	81
Adolf Wirz Inc.	Zurich	MJ	8,706	43.7	58,070	43.7	80	74
Advico AG	Zurich	NE	7,919	32.5	52,822	32.5	66	64
McCann-Erickson Switzerland	Geneva/Zurich	MJ	7,326	27.8	48,864	27.8	60	60
Young & Rubicam	Zurich	MJ	7,178	29.6	47,940	29.6	71	69
HDM Switzerland	Zurich/Geneva	MJ	7,005	36.4	46,699	36.3	68	70
Farner Publicis	Zurich	MJ	6,000	50.8	40,019	50.8	65	62
Lintas:Switzerland	Zurich	MJ	5,520	36.7	36,816	35.7	51	51
Leo Burnett Group	Zurich/Lausanne	MJ	4,960	23.4	33,068	23.4	52	46

NOTES: All currency is given as U.S. dollars in thousands. Exchange rates are given for 1987 and 1986, respectively.

Agency	City	Owner-ship	Gross income	% chg	Billings	% chg	Work force 1987	Work force 1986
DDB Needham	Zurich	MJ	4,670	21.1	33,079	28.7	49	NA
Ogilvy & Mather	Zurich	MJ	3,888	16.4	25,944	16.5	46	44
Kloeti Advertising	Zurich	MN	3,600	15.0	24,398	15.0	32	32
J. Walter Thompson AG	Zurich	MJ	3,403	33.6	22,683	33.5	28	30
Heinz Heimann	Vesenaz/Geneva	MN	3,016	5.9	20,116	5.9	35	46
TBWA	Zurich	MJ	2,594	17.6	17,350	17.8	30	22
Saatchi & Saatchi International	Geneva	MJ	2,114	NA	14,096	NA	NA	NA
BEP	Lausanne	MJ	2,017	23.9	13,458	24.0	21	23
Cash RSCG	Zurich	MJ	1,900	35.0	14,269	43.6	20	19
Zogg, Kettiger, Gasser	Zurich	NA	1,719	33.3	10,378	20.8	17	17
Grey Switzerland	Geneva	MN	1,629	22.9	10,867	22.8	20	19
D'Arcy Masius Benton & Bowles	Zurich	MJ	967	47.9	6,450	48.0	10	17
Kern & Kern	Zurich	NA	243	NA	1,622	NA	6	NA
Rogivue Consulting	Seelisberg	NA	128	29.9	346	24.6	1	1
TAIWAN			***Exchange rates: 0.030400/0.024700 Taiwan dollar***					
United Advertising Co.	Taipei	NA	5,670	55.2	33,849	56.8	187	158
Ogilvy & Mather (Taiwan)	Taipei	MJ	2,991	63.7	19,622	70.2	129	117
United McCann-Erickson	Taipei	MJ	2,555	107.6	17,042	34.3	107	80
DIK-Ocean	Taipei	MN	2,512	81.5	16,748	81.5	75	NA
Regal International	Taipei	NE	2,280	28.2	15,200	28.2	90	80
Hwa Wei & Grey	Taipei	MN	2,074	86.6	13,632	120.7	62	62
Saatchi & Saatchi Gaynor	Taipei	MJ	1,963	NA	13,092	NA	75	NA
Eastern Advertising	Taipei	NA	1,845	38.0	11,917	47.1	84	82
China Commercial Advertising	Taipei	NA	1,806	33.9	13,376	38.9	82	75
International Advertising	Taipei	NA	1,664	52.3	11,096	52.3	67	62
Leo Burnett Inc.	Taipei	MJ	1,369	98.2	9,129	98.2	72	53
Lintas:Taiwan	Taipei	MJ	1,129	346.6	7,534	376.6	40	23
Target Advertising	Taipei	NE	1,003	35.4	6,384	41.2	48	36
DDB Needham	Taipei	JV	661	NA	4,043	NA	34	NA
Stentor/BBDO	Taipei	MN	365	40.7	2,433	31.3	NA	55
THAILAND			***Exchange rates: 0.042800/0.045300 baht***					
SSC&B:Lintas Thailand	Bangkok	MJ	6,030	12	40,222	5.5	181	159
Ogilvy & Mather	Bangkok	MJ	3,444	4.2	23,689	12.0	137	135
DDB Needham	Bangkok	MN	2,232	319.6	10,995	209.9	30	33
Diethelm Advertising	Bangkok	NE	2,161	20.8	11,984	23.0	115	106
Far East Advertising	Bangkok	MN	2,109	17.8	14,065	17.8	145	136
McCann-Erickson (Thailand)	Bangkok	MJ	1,953	9.1	13,024	9.1	83	90
Prakit/FCB	Bangkok	MN	1,458	53.3	9,728	53.4	123	91
J. Walter Thompson Co.	Bangkok	MJ	1,428	18.7	8,098	18.7	60	48
Amex & Grey Advertising	Bangkok	MN	945	45.2	6,301	45.1	56	56
Chuo Senko Advertising	Bangkok	NA	917	NA	4,422	NA	NA	NA
HDM-DYR Thailand	Bangkok	NA	901	88.2	NA	NA	59	34
Ball Partnership	Bangkok	MJ	629	6.1	4,195	(9.8)	32	NA
D'Arcy Masius Benton & Bowles	Bangkok	MN	342	NA	2,283	NA	63	NA
Ogilvy & Mather Direct	Bangkok	MJ	283	119.6	1,887	119.6	12	10
Saatchi & Saatchi Advertising	Bangkok	MJ	261	NA	1,626	NA	43	NA
Synergie Communications	Bangkok	NE	116	148.9	4,055	61.7	42	36
Thai Image Advertising	Bangkok	MN	105	16.7	698	16.3	NA	NA
TRINIDAD			***Exchange rates: 0.250000/0.284300 Trinidad dollar***					
McCann-Erickson (Trinidad)	Port of Spain	MJ	1,926	(14.9)	12,845	(14.9)	68	69
Lonsdale Advertising	Port of Spain	NA	757	1.3	5,047	11.0	42	36
Corbin Advertising	Port of Spain	MJ	661	15.0	3,314	15.0	28	33
Hernandez/FCB	Port of Spain	MN	345	(34.3)	2,303	(34.3)	28	28
Kenyon & Eckhardt/Caribbean	Port of Spain	MN	295	(3.1)	1,334	(8.0)	21	22
TURKEY			***Exchange rates: 0.001234/0.001500 lira***					
Guzel Sanatlar	Istanbul	NE	4,136	139.8	27,580	54.9	73	73
Manajans/Thompson	Istanbul	MN	3,136	(3.0)	15,567	10.7	136	124
McCann-Erickson Pars AS	Istanbul	MJ	2,434	23.1	16,236	23.1	85	88
Ajans Ada	Istanbul	NA	2,346	32.5	14,223	52.7	88	90
Cenajans	Istanbul	NE	2,169	7.1	17,640	28.2	85	85
Moran Ogilvy & Mather	Istanbul	MN	2,158	35.7	12,931	40.6	54	59
Grafika:Lintas	Istanbul	MN	1,641	43.0	10,947	37.7	65	57
Merkez Ajans Reklam	Istanbul	NA	859	27.3	4,556	31.4	50	38
Rota Advertising	Istanbul	NA	793	50.7	5,101	35.7	38	41
Reklamevi	Istanbul	NA	750	4.4	5,167	34.0	42	30
Fulmar Advertising	Istanbul	NA	710	31.4	3,085	(4.3)	26	26
Yaratim/FCB	Istanbul	MN	707	42.8	4,716	42.6	30	25
Markom/Leo Burnett Reklam	Istanbul	MN	610	55.3	4,072	42.1	35	27
Ekol Advertising	Istanbul	NA	561	103.5	3,740	103.5	27	23
Repro Reklam Ajansi	Istanbul	NA	464	1.2	3,363	9.8	37	37
Admar Reklam ve Pazarlama	Istanbul	NA	346	23.2	3,200	11.7	23	19
Birikim Reklamcilik	Istanbul	NA	323	NA	2,155	NA	15	7
Parajans	Istanbul	NA	220	59.7	1,632	225.5	21	18
A&D International Advertising	Istanbul	NA	192	(3.0)	2,296	10.6	27	31

NOTES: All currency is given as U.S. dollars in thousands. Exchange rates are given for 1987 and 1986, respectively.